

## Assessment of Commercial Tourism Opportunities at Lake Moondarra

For Mount Isa Townsville Economic Zone - May 2016



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## EXECUTIVE SUMMARY

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Pacific Southwest Strategy Group was commissioned by *MITEZ* to undertake an *Assessment of Commercial Tourism Opportunities at Lake Moondarra*. The core purpose of the study was to investigate *commercial* development options to increase visitation and spend at Lake Moondarra Recreation Area (LMRA).

Consultation and the site assessment have determined that LMRA has the resources necessary for sustainable *commercial* development and that with better industry coordination, targeted marketing and resourcing, it has the potential to attract double visitation numbers within 12 months of implementation of several business initiatives.

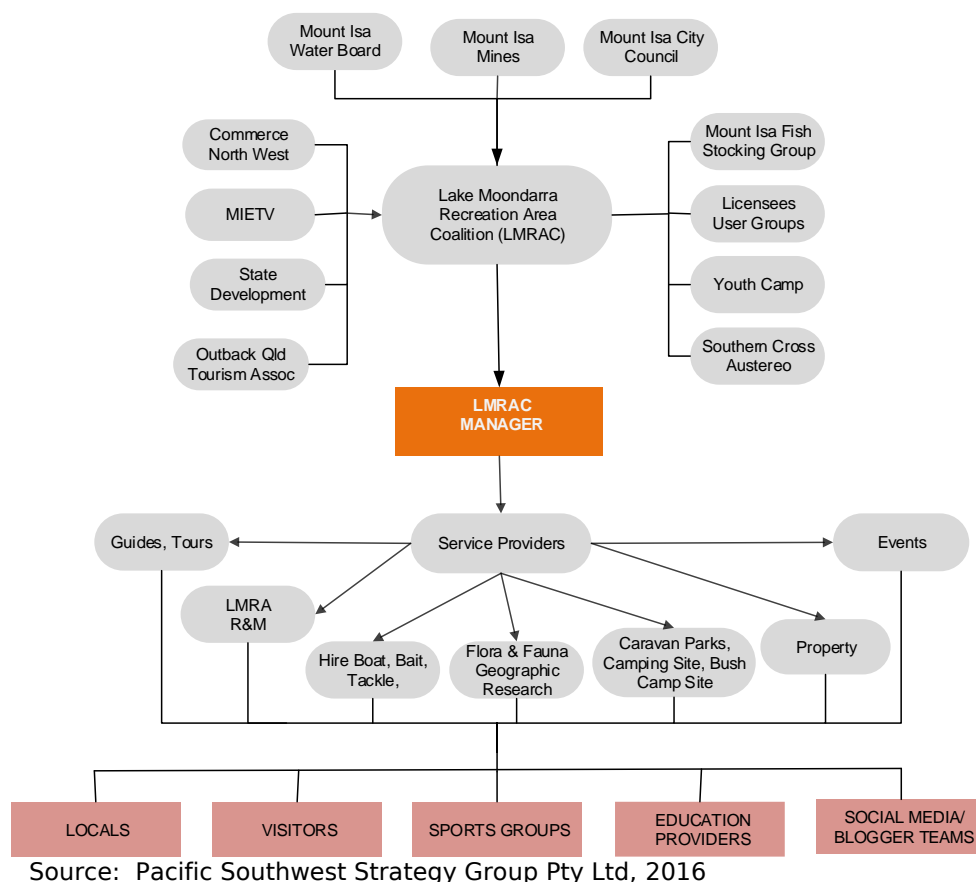
The proposed strategy is built around the wants and needs of locals as a baseline income stream.

With the introduction of three or four new business with the potential to increase visitations to 120,000 in the first full year together with estimated gross revenue of between \$7.5 mill to \$8.0 mill.

In order to drive the implementation of the strategy, it will be necessary to form a project group that reports to a recreation area management team such as the *Lake Moondarra Recreation Area Coalition* (LMRAC) who will manage the progress of these initiatives through the feasibility and practicality stage over the next two to five years.

The implementation of a *Lake Moondarra Operational Management Framework* will supervise funding, planning and feasibility of projects using LMRAC as the gateway during the implementation phase as depicted in the figure below:

Figure E1: Proposed Lake Moondarra Operational Management Framework



Use of an incorporated not-for-profit community entity will allow access to grants, donations and sponsorships unavailable to commercial/ private companies.

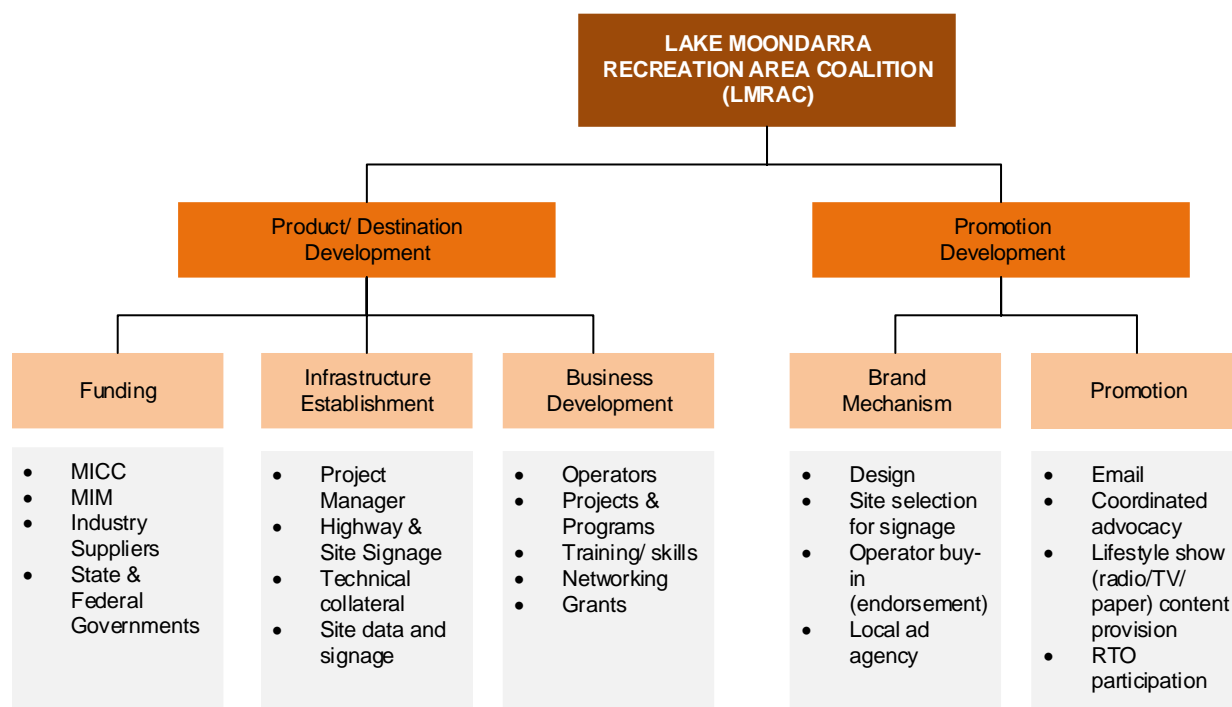
While the LMRAC will be separate from MIWB, it will be subordinate. It is proposed that it will initially work as a steering committee, made up of one representative from each of the following organisations:

- Mount Isa Water Board (MIWB);
- Mount Isa Regional Council;
- Mount Isa Mines (MIM);
- Commerce North West;
- MIETV;
- Department of State Development, Infrastructure & Racing;
- Radio Station;
- Ski Club;
- Canoe Club; and
- Guides.

The proposed tasks of LMRAC are set out below:



Figure E2: Lake Moondarra Development Functional Map



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

Commercial opportunities that emerged from the consultation process were assessed and graded in section 6.0 – Development Options. Set out below is the shortlist commercial tourism projects that, once implemented, will provide an estimated 60,300 visitors to Mount Isa, most of whom could not have been facilitated in an existing caravan park in the area due to lack of suitable sites:

Description	
<b>LEVEL 1 COMMERCIAL PRIORITIES:</b>	<b>LEVEL 2 AMENITY PRIORITIES:</b>
Equipment Hire Retailer	Floating Jetty, Moorings & Loading Dock
Bait & Tackle Shop	MICC Youth Camp
Caravan Park & Camping Site	Birdwatching Centre
Party Boats & House Boats	Free Camping Grounds
Canoe Club Cafe	Wilderness Walks & Guided Tours

Source: Pacific Southwest Strategy Group Pty Ltd, 2016

The critical path or the game changer for the commercial success of LMRA will be the introduction of the:

- Caravan Park;
- Equipment Hire Outlet;
- Canoe Club Café; and
- Bird Watching Centre.

Collectively these commercial entities have the potential to generate income in excess of \$7.5 mill and attract an additional 60,300 visitors in the first year of operation that will result in a sustainable model.



## 1.0 INTRODUCTION

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### 1.1 Project Context

Lake Moondarra is located within the city limits of Mount Isa Council (MICC) and is managed by the Mount Isa Water Board (MIWB). As Trustee, the MIWB manages a considerable amount of infrastructure under its obligations to maintain trust land as a *reserve for recreation and water purposes*.

The Mount Isa community has had a strong attachment with Lake Moondarra in Kalkadoon country since its inception in the 1950's as part of the infrastructure support for Mount Isa Mines (MIM). It is still the "go to" place for locals as the most significant water body in the area and offers a range of recreational pursuits.

The dramatic increase in eco-tourism has led to stakeholders recognising opportunities to capitalise on the tourism growth potential of the Lake for the benefit of the local economy and the improved lifestyle for local residents.

As a result, the *Mount Isa, Townsville Economic Zone* (MITEZ) sought funding to undertake an assessment of commercial opportunities at Lake Moondarra. The project was commissioned in April 2016 with MITEZ as manager and with the sponsorship of the *Queensland Department of State Development, Infrastructure and Planning*.

Figure 1: Lake Moondarra Sunset

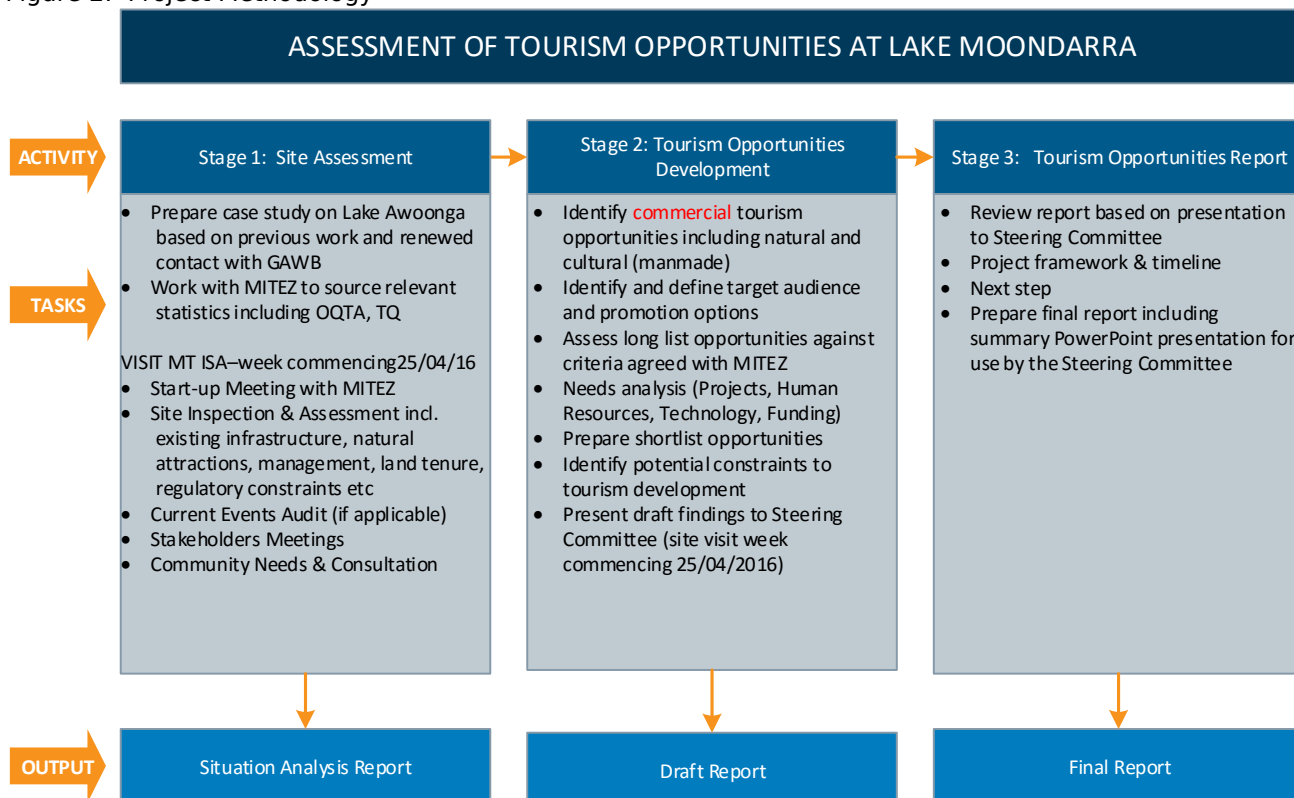


Source: Gary Murray, Mt Isa Coaches, 2016

## 1.2 Project Methodology

The project was undertaken in three stages as set out below:

Figure 2: Project Methodology



Source: Pacific Southwest Strategy Group, 2016

## 1.3 Project Objective

The objective of the project was to assess opportunities to develop a *commercially operated tourism facility* at Lake Moondarra catering for varied target markets including community/locals, tourists, RV's, caravans and campers.

It was clearly important that the study focus on commercial opportunities as funding for non-commercial opportunities was not readily available. It was also recognised that commercial opportunities, once implemented would result in an improvement of amenity for the enjoyment of locals as well as tourists.

## 1.4 Project Location

The figure below shows Lake Moondarra in its North West Queensland location and in relation to the coastal population centres and major road network.

Figure 3: Mount Isa and Lake Moondarra



Source: Pacific Southwest Strategy Group, 2016 based on Google maps

Figure 4: Lake Moondarra



Source: Gary Murray, Mt Isa Coaches, 2016

## 2.0 SECONDARY DATA REVIEW

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### 2.1 Recreational Fishing

There are between 700,000 to 750,000 active anglers in Queensland who take home 8,000 tonnes of catch each year. Recent closures of coastal fishing grounds has created increased demand for fishing in inland lakes and water storage facilities.

While the *Lake Moondarra Fishing Classic* is hosted in October each year by the *Mount Isa Fish Stocking Group*, there are opportunities to provide equipment hire, bait and tackle and fishing guides to the many locals and visitors who do not have fishing boats.

### 2.2 Bird Watching

The growth in birding internationally has been an eco-tourism sleeper.

According to a study in the US, active birders spent US\$32 billion in 2000/2001. Comparative statistics in Australia are unavailable, however *Birdlife Australia* data provides the basis for the annual spend for its 12,500 members and 75,000 supporters.

Based on the same US data of \$1,500 to \$3,400 spend per person pa, it was estimated that if similar amounts were expended by the *Birdlife Australia* membership (ie. 12,500 pax), it was estimated that between \$19.4 to \$41.8 million is spent in Australia each year. In addition, if the average *Birdlife Australia* supporter (ie. 75,000 pax) donated \$50 each year, this would equate to a further A\$3.75 million pa. This does not include expenditure of the wider Australian population.

Figure 5: Clear Water Lagoon Birdlife



Source: Rex Whitehead, 2016

Having said this, bird watching is not recognised in any lists of *non-game* past times or recreation endeavours or as *non-consumptive wildlife users*. A study in the US found that there were 61 million birders whose income levels were well above average (Keslinger 1993).

Areas in R48 Reserve including Clear Water Lagoon offer considerable non-invasive opportunities for guided tours, viewing hides and bird counts. In fact, in May 2016 *Birdlife Australia* is undertaking a survey of the rare scrub wren which suffered badly from bushfires in 2010 and floods in 2013. Such events provide attractive promotional



opportunities for local bird watchers to invite volunteers to assist, thereby raising the profile of bird watching at Moondarra.

Figure 6: Nature Tours



Source: Gary Murray, 2016 NOTE: Tour boat/pontoon once used at Lake Moondarra

## 2.3 Bush Walking & Wilderness Trails

The *Queensland Department of National Parks, Sport & Racing* defines eco-tourism as ecologically sustainable tourism with a primary focus on experiencing natural areas. Currently, the Department is inviting proposals for developing privately owned, low impact, and purpose built eco-tourism infrastructure through an EOI process.

Reference should be made in this regard to *DestinationQ* and partnerships to reach \$30 billion in overnight stays by 2020.

Figure 7: Lake Moondarra Wilderness/ Rock Formations



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

Lake Moondarra is a perfect destination for the wilderness explorers discussed later in the report.

Figure 8: Lake Moondarra Wilderness/ Rock Formations & Kalkadoon Stone Carvings



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

### 3.0 CONSULTATION

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Engagement took place in Mount Isa week commencing 26 April as follows:

- Half day site inspection with MIWB/CEO of most physical aspects of the Lake and the 100 Ha Recreation Area;
- One-on-one meetings with MITEZ, MIETV, MICC, Tour operators, Queensland Department of State Development, Bus operators, Mount Isa Caravans, Motels and FIFO accommodation providers, Isa Rodeo; pastoral lessees and bird watchers;
- Black Rock BBQ – Media representatives, primary and secondary school principals, logistics providers, MICC Counsellors, State Government representatives (20-25 attendees);
- Users including clubs and tenants without leases, locals
- Introductions to MICC present and past Counsellors, present and past MIWB Directors;
- Community meeting – Outback @ Isa – 20 attendees
- ABC Radio interviews – two interviews with Hailey Renault and follow up stories with community participants; and
- The North West Star – two interviews with Chris Burns and promotional stories pre-event.

These meetings were extensive and fruitful and resulted in nearly 150 ideas and opportunities summarised into the following categories:

- Security and safety (N.30 ideas);
- Infrastructure (N.28);
- Commercial (N.24);
- Signage (N.24);
- Events (N.16);
- LMRA Coalition Planning (N.12);
- Brand & Promotion (N.8); and
- Repairs & Maintenance (N.4).



### 3.1 Issues

The following graphic summarises issues raised during the consultation phase into categories of infrastructure, tenure, development and safety:

Figure 9: Summary of Issues

LAKE MOONDARRA – SUMMARY OF ISSUES			
Infrastructure	Tenure	Development	Safety
<ul style="list-style-type: none"> <li>Improved amenity</li> <li>Anchored pontoons/ pontoon dock</li> <li>Floating jetty</li> <li>Floating boat ramp &amp; loading dock</li> <li>WiFi hot spots</li> <li>Upgrade to swimming enclosure</li> <li>Waste management plan</li> <li>Improved wallaby walk</li> <li>Horse riding trail</li> <li>Mountain bike trail</li> <li>Lighting at Black Rock &amp; proposed commercial sites</li> <li>Wildlife trails</li> <li>Bike track (city to Lake)</li> </ul>	<ul style="list-style-type: none"> <li>5-10 year leases for current users/occupiers</li> <li>24/7 access</li> <li>Hire equipment storage sheds</li> <li>20 year lease for caravan and cabin developer</li> <li>Birdwatching lease</li> <li>In-water mooring</li> </ul>	<ul style="list-style-type: none"> <li>Caravan &amp; cabins</li> <li>Canoe club café</li> <li>Bush camp</li> <li>General camping</li> <li>Warrina Park kiosk</li> <li>MICC Youth Centre</li> <li>New Lake Moondarra brand</li> </ul>	<ul style="list-style-type: none"> <li>Increased sun protection (eg. Shade trees &amp; sails) &amp; sun protection signage</li> <li>Mosquito control</li> <li>Duck lice eradication</li> <li>Noxious weed control</li> <li>Greater Rec Area boundary definition</li> <li>Improved security (eg. CCTV)</li> <li>Major signage upgrade</li> </ul>

Source: Pacific Southwest Strategy Group Pty Ltd, 2016

It is important to note that control of the recreational area is not a core part of MIWB business and it is too much to expect to address all issues raised, both from a human and financial resource perspective. The beneficiaries of the water impoundment are not just the City, or MIM, but also the quarries, the industry service providers, Queensland Treasury and the residents of Mount Isa. Therefore, it will be necessary that various stakeholders work together to provide the resources required to develop and implement *commercial* projects.

### 3.2 Opportunities

A wide range of opportunities were identified during the consultation phase:

- Bird watcher centre;
- Caravan/RV park and camping grounds;
- Bush Camp establishment;
- Internet and smart phone hot spots;
- Café at Canoe Club;
- New designated camping ground near showers/toilets;
- Bird watching hides at Clearwater Lagoon;
- Membership drive for user clubs;
- Rebrand youth centre (ie. Wilderness Digs);
- Mountain bike trail;
- Public bus service from Mt Isa;
- Bird watch muster; and
- Commuter bus service.

### 3.3 Constraints

Constraints relative to development of commercial tourism opportunities at Lake Moondarra include:

- All tenants awaiting promised new leases;
- Encroaching noxious weed in Transport Bay swim areas, canoe launching
- Health concerns regarding sunburn, insects, water weed and some pedestrian pathways;
- No emergency telephone hot spots;
- Shower and toilet blocks in need of upgrade;
- Insufficient shade areas (including shade structure and shady trees);
- Lockout times;
- Insufficient rubbish removal program;
- Lack of approved camping sites or caravan park;
- Lack of jetty and loading dock
- No equipment available for hire; and
- No on-site storage sheds.

Figure 10: Lake Moondarra



Source: Gary Murray, Mt Isa Coaches, 2016

## 4.0 SITE ASSESSMENT

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Lake Moondarra is contained within a gazetted reserve set aside for recreation and water purposes. The MIWB has been appointed as the Trustee for day to day management with the necessary delegated authority.

A Land Management Plan was prepared for the management of the reserve and was approved in May 2014.

The reserve comprises approximately 11,000 hectares of which the lake occupies 2,375 hectares at full capacity.

Construction of the impoundment was completed by *Mount Isa Mines Limited* (MIM) in 1957.

### 4.1 Site Description/ Tenure

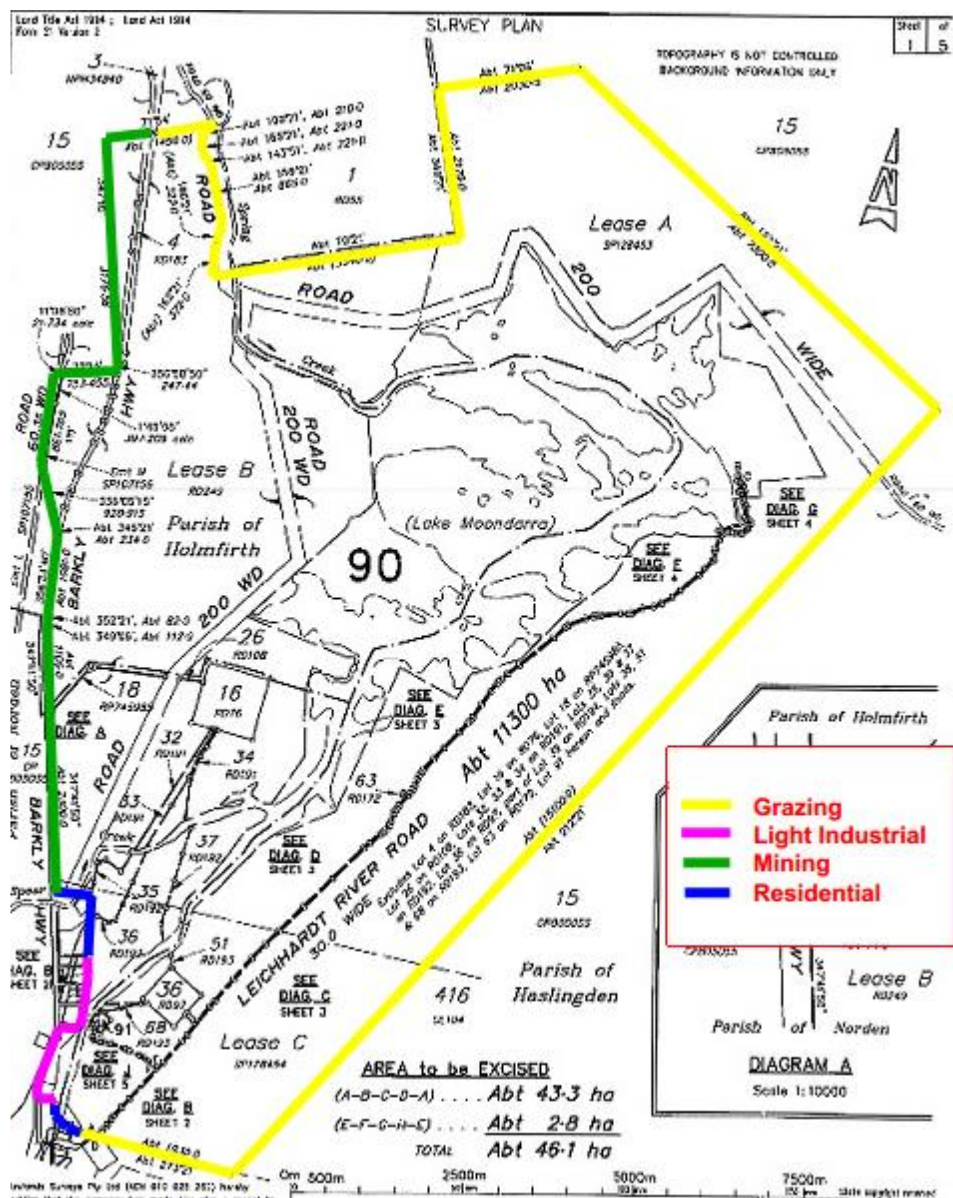
Trust Land Description: Reserve for Recreation and Water Purposes, Reserve 48. Trustee for the reserve is the Mount Isa Water Board (MIWB).

Land Description: Lot 90 on Plan SP 237661 Parish of Holmfirth, County of Rochedale and within the Local Government area of Mount Isa City Council.

Native Title: Native Title claim of the Kalkadoon People number 4 covers Lot 90 on Plan SP237661 (NNTT reference QC05/12; Federal court reference QUD 579/05). Native Title implications will be assessed in accordance with the State's Native Title Work Procedures prior to any dealings being undertaken on the reserve.

Cultural Heritage: A number of cultural heritage sites located within the Reserve, are protected under Aboriginal Cultural Heritage legislation.

Figure 11: Lake Moondarra and Reserve 48



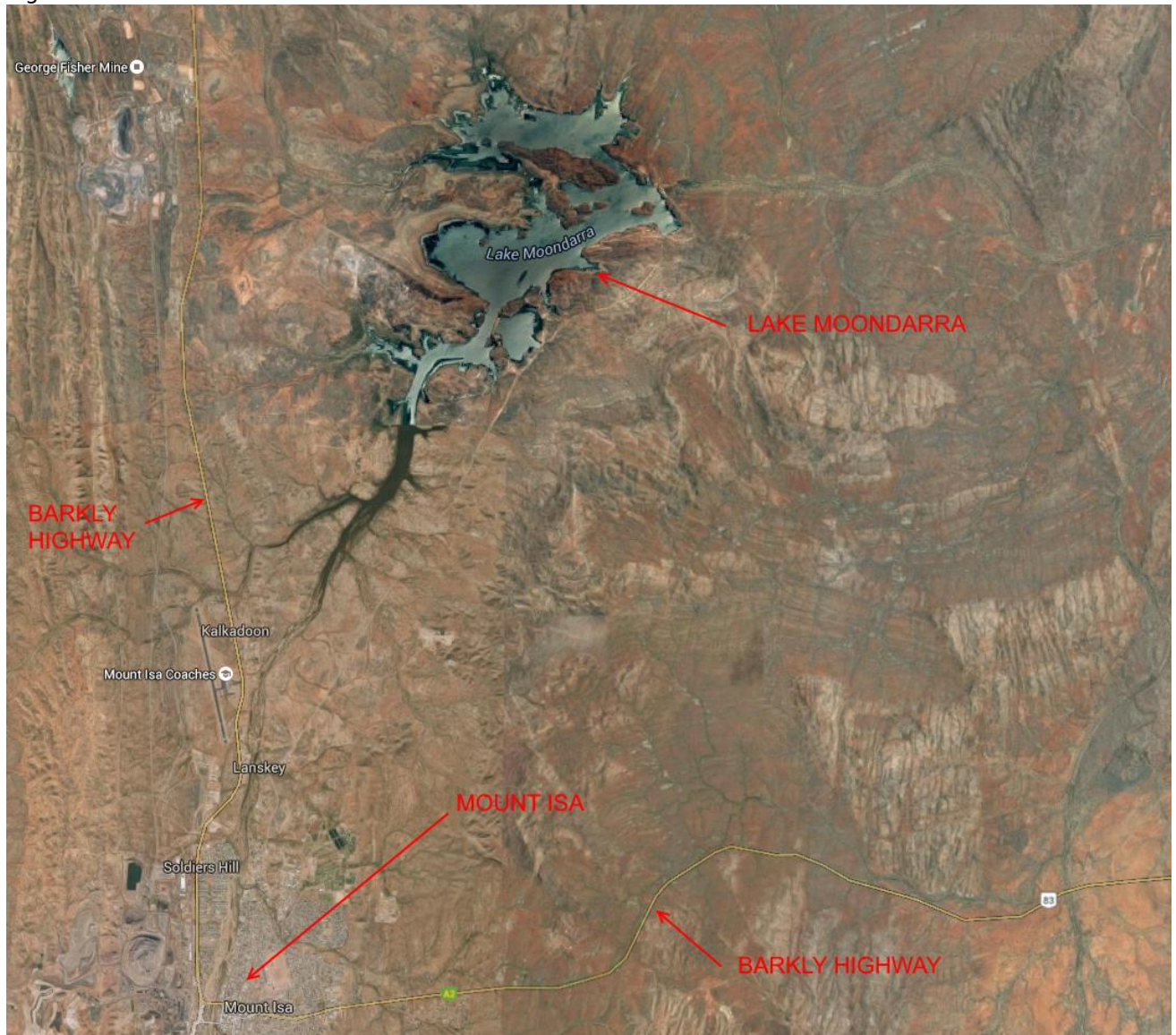
Source: Reserve 48 Trust Land Management Plan



## 4.2 Proximity to Highway and Town Centre

Lake Moondarra is 16 kilometres from Mount Isa along the Barkly Highway and then Leichhardt River Road. The road, owned and maintained by MICC, is bitumen sealed to the dam access. This section was in reasonably good condition at the time of the site visit.

Figure 12: Lake Moondarra Road Access



Source: Pacific Southwest based on Google Maps, 2016

Mount Isa is the nearest service centre for major supplies.

### 4.3 Transport Access and Highway Linkages

The linkages to Mount Isa include:

- To the East, the Barkly and Flinders Highways to Townsville, via Cloncurry, Julia Creek and Hughenden and the Barkly and Capricorn Highways to Rockhampton via Cloncurry, Longreach and Emerald;
- To the west, the Barkly and Sturt Highways to Darwin, via Tennant Creek, Daly Waters and Katherine.

### 4.4 Vehicular Parking and Pedestrian Access

Ingress to most parts of the Reserve are unsealed and lack consistent directional and safety signage.

#### 4.4.1 Ski Club Access

As the road approaches Kingfisher Point there is a locked gate that is often in disrepair as a result of impatient/ annoyed drivers ramming it with their bull-bars.

Note (right hand image below) that the toilet block (see foreground of image) is located across the road from the Ski Club. The road above the ski club twists and turns to the point of a rise of 13 metres and drivers come across members trying to cross the road to the toilets very suddenly which has nearly caused several major/ potentially fatal accidents.

Figure 13: Lake Moondarra Google Maps View



Source: Guido Pittis, 2016

It would appear three issues need to be addressed:

1. Maintenance of locked gates;



2. Addition of a pedestrian walkway with guard rail suitable for disabled access; and
3. Installation of convex mirrors to alert both pedestrians and vehicles of on-coming traffic.

#### 4.4.2 Youth Camp Access

Access is limited to 4WD and may need remedial work on the approach road for less experienced 4WD drivers. Alternative access will be required if the youth camp is to expect visitation from non 4WD vehicles and buses.

#### 4.4.3 Transport Bay

Access and parking to the Transport Bay is the most organised. Parking bays are spacious and well maintained, however at weekends during summer the area is overcrowded and there will be a need to expand parking bay numbers.

Figure 14: Transport Bay



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

#### 4.4.4 The Junction

Access to the junction is difficult to locate and has no directional signage. Access is via a series of criss cross dirt roads that generally require local knowledge to find them.

Figure 15: Various Dirt Tracks Accessing the Junction



Source: Pacific Southwest Strategy Group Pty Ltd, 2016



#### 4.4.5 West Side

On the western side of the Lake, much of the land is public although Pipeline Road (designated Road 200WD) is owned by the Trust. It is claimed that the road is not for public use although restrictions were relaxed years ago. There needs to be consideration to granting public access to Pipeline Road to enable access to Spring Creek.

## 4.5 Existing Users of Lake Moondarra Reserve

The following table lists the current users of the Lake Moondarra reserve.

Table 1: Existing Reserve Users	
GROUP	ACTIVITY
Mount Isa Astronomy Group (MIAG)	Astronomical observation activities. MIAG was established in 1997 and has a small observatory facility next to Lions Youth Camp. Currently, no lease or permit in place.
Mount Isa District Bowhunters (MIDB)	Field archery activities. MIDB has a clubhouse and field archery area near the Leichhardt River Road entry to the reserve. Activities include traditional target archery and simulated hunting by erecting targets on trails. Currently, no lease or permit in place.
North West Canoe Club (NWCC)	Canoeing and kayaking activities. NWCC uses the large building in Transport Bay as a clubhouse. Activities include recreational and competition canoeing and kayaking and regular training activities. Currently, no lease or permit in place.
Isa Rats Running and Triathlon Club	Running swimming and cycling activities. Lake Moondarra provides an area of water for the swimming leg of the triathlons, with running and cycling on the adjacent land or roads. Shares some facilities with NWCC, have no facilities of their own. Currently, no lease or permit in place.
Mount Isa Water Ski Club (MIWSC)	Competitive and social water ski activities. MIWSC has an activity area on the foreshore of Lake Moondarra with a boat ramp, picnic and observation area. There is a basic slalom course in front of this area. Currently, no lease or permit in place.
Mount Isa Fish Stocking Group (MIFSG)	Fish stocking and fishing activities. MIFSG was established in 1987, and is a community based club carrying out fish breeding and fish stocking programs in the impoundments of the Mount Isa region. Target species are currently: Barramundi and Sooty Grunter.
Mount Isa Primary and Secondary Schools	Outdoor educational and recreational activities, including canoeing, rock climbing and archery. Permitted by event.
Mount Isa Community Groups	General enjoyment of the reserve. Permitted by event.

Source: Reserve 48 Trust Land Management Plan

Source: Reserve 48 Trust Land Management Plan



## 4.6 Existing Facilities and Infrastructure

Following is a brief overview of the main facilities and infrastructure within the recreation reserve including:

- The Lookout;
- The Junction;
- Kingfisher Point;
- Transport Bay area;
- Warrina Park;
- West Side;
- Bush Camp & Wilderness Trails;
- Wallaby Walk;
- Hatchery;
- Bowhunters Club;
- Mount Isa Water Ski Club ;and
- Youth Camp.

There is a fish hatchery located off-site in Mount Isa.

### 4.6.1 The Lookout

This site provides an impressive vista of the dam wall and a wonderful overview of the Lake. Ample parking is available for the sunset experience. There is a need for maintenance of opening celebrations plaques to provide a better impression for first time visitors.

Figure 17: The Lookout – (L) Carpark; (M) Interpretive Signage; (R) Dam Wall



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

### 4.6.2 The Junction

This area is spacious and well maintained and is situated on the south eastern side of the Reserve. The area has become an unofficial meeting place for locals although travellers do find their way there (miraculously!) Overnight camping is prohibited (officially) however campers generally ignore the warning signage.

The west side of The Junction needs a signposted walking trail to enable visitors to discover its hidden gems.



Figure 18: The Junction



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

#### 4.6.3 Kingfisher Point

This area was once busy and the home of the Mount Isa Sailing Club. The area is well suited to house several of the commercial opportunities identified during the consultation phase of this project such as a caravan park and camping facility.

Figure 19: Kingfisher Point



Source: Pacific Southwest Strategy Group, 2016

#### 4.6.4 Transport Bay Area

This is the most popular visitor area of the Lake because of ease of access and amenity although shade and shelters are in short supply.

Figure 20: Transport Bay



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

#### 4.6.5 Warrina Park

Warrina Park is very popular with parents of small families due to its picturesque nature and the fully fenced enclosure. The cream building is a disused kiosk, abandoned in 1993. The Park would benefit from the re-introduction of kiosk facility so that parents can enjoy light refreshments while their children play.

Figure 21: Warrina Park



Source: Pacific Southwest Strategy Group Pty Ltd, 2016



Figure 22: Warrina Park



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

#### 4.6.6 West Side

The west side has several stunning coves with abundant flora and fauna. It is recommended that a wilderness visitors plan be developed with the guidance of a proposed Friends of Moondarra or an operational entity of key stakeholders who could manage areas between Spear and Spring Creeks. This area is of particular interest to birdwatching groups and may appeal as a permanent base for them.

Various proposals were suggested for its continuance despite the lack of amenity and descending water line in times of drought.

At present, conflicting signage both welcomes visitors and forbids their entry!

Figure 23: Conflicting Signage on Pipeline Road



Source: Rex Whitehead, 2016



#### 4.6.7 Wallaby Walk

This amenity has merit especially if it included a supervised wallaby feed session during the tourist seas and could develop as a major attraction that could raise the profile of the Wallaby Walk. However, there is a need for wider, safer footpaths with safety rails and replacement flora and fauna information panels.

Figure 24: The Wallaby Walk



Source: Pacific Southwest Strategy Group, 2016

#### 4.6.8 The Mount Isa Fishery Breeding Group

The breeding activities for the group are impressive and of a high standard. Over the last 20 years a dedicated committee has developed technology to reproduce fish species solely in freshwater. First impressions indicate the committee is a most professional team, one of the best Pacific Southwest has experienced. Such professionalism bodes well for future planning on a broader scale in overall operations of this standard.

Figure 25: The Fish Hatchery



Source: Pacific Southwest Strategy Group Pty Ltd, 2016



#### 4.6.9 Mount Isa District Bowhunters Club

The Club was established in 1978 and has 70 members, 40 senior shooters, three juniors, six cubs and additional family and non-shooter members.

The Club owns its clubhouse and facilities which include five butt targets for night shooting, two course with 20 ABA targets and the hill course also with 20 targets.

No issues or concerns were identified in discussions with the Club Secretary other than the Bowhunters are still waiting for their lease.

Figure 26: The Bowhunters Club



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

#### 4.6.10 Mount Isa Water Ski Club

The area occupied by the club is basic with little or any improvements in recent years and barely meets user's needs.

Figure 27: (L) Lake Moondarra Aerial View and (R) Lake Moondarra Ski Club and Boat Ramp



Source: Anne Pittis, 2016

#### 4.6.11 Mount Isa Youth Camp

The Lions Youth Camp was closed by MIWB in 2009 following years of uneconomic operation. The facility is situated close to Lake Moondarra. In February 2015, MICC entered into a lease agreement which has now been approved by the *Queensland Department of natural Resources and Mines*.

The Youth Camp is currently undergoing refurbishment to its gardens and 19 bedrooms. In addition there is a swimming pool, kitchen and dining facilities making it suitable to accommodate other groups such as wilderness seekers, bird watchers and astrological observers, in addition to students.

Figure 28: The Youth Camp



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

Figure 29: The Youth Camp



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

It is suggested that in order to improve occupancy rates, MICC should reconsider the continued use of the word "Youth" to broaden the market appeal.

In addition, bed capacity should be re-evaluated to accommodate larger numbers such as bus groups and school groups including grade cohorts, teachers and parents.



#### 4.6.12 ISA RATS Running & Triathlon Club

The RATS focus on training and events between April and October each year. Its major event is *Outback to the Stack* held in July each year.

The RATS share the Canoe Club facilities and storage areas.

#### 4.6.13 North West Canoe Club

The Club is well established with an active membership in excess of 40 people. It is located in a prime position at Transport Bay. It owns its own premises which includes public showers and toilets together with a large craft storage area and disused café. The Club is famous for its major event, the *Gregory River Canoe Marathon*, which it holds on the first Sunday in May each year. In addition, the Club has numerous other events including *moonlight paddles*, *desert nights* and *kayak orienteering* (paddle games) together with its annual *Come and Try Day*.

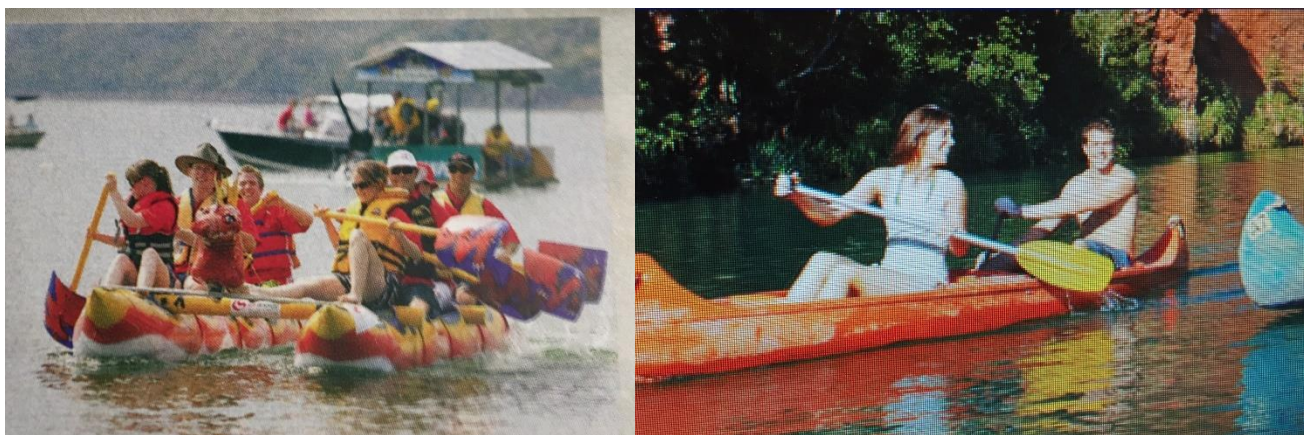
The Club recently spent \$70,000 on improvements together with the erection of a large space opposite paid for and installed by the Canoe Club

Figure 30: Kayaking on the Gregory River



Source: The North West Star, 2016

Figure 31: Kayaking on the Gregory River



Source: The North West Star, 2016

Figure 32: Lake Moondarra Canoe Club



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

#### 4.6.14 Astrological Observatory

This facility is located just north of the Youth Club and depends on it for water and electricity. However, since the Youth Club closed and went into disrepair, the water supply was cut. As a result, the grounds around the observatory are in disrepair.

Recently, lightning hit the electricity lines to the main building and since then the property has been without power.

Figure 33: Mount Isa Astrological Observatory; Observatory Image and Members at External Interment Piers



Source: Len Fulham, 2016

The Club owns two telescope with roof rails and in the yard there are four piers for members who own their own instruments. Due to these problems, the observatory has not been able to undertake further work on a donga obtained to be remodelled as club rooms.

When the Youth Club was in operation, school groups of up to 30 students, 20 parents and ten teachers were regularly in attendance.

Due to its incapacitation, membership of the Astrological Observatory has declined although the current committee is hoping for assistance in restoring electricity and water services in the near future.

#### 4.6.15 Stack City MTB Inc. Mount Isa

This Mountain Trail Bike Club was recently incorporated and is seeking trails in association with walkers, joggers and schools. The Committee wishes to establish infrastructure in the Reserve and secure a lease to establish trails and skills centre pump track.

Mountain biking now has a substantial following with many events now televised on free to air and cable television.

Apart from competitions course, there is local demand for a less strenuous trail circuit around the Lake for casual riders interested in beautiful scenery and opportunities for regular stops that will attract bike hire from locals and visitors.

### 4.7 Town Planning Issues

Existing and proposed new uses within the reserve will need to comply with the requirements of the Land Management Plan, in particular:

- Need for the Trustee to manage the Reserve in a manner that is consistent with its gazetted purpose and is compliant with legislation and regulations;
- Need to ensure that Users of the Reserve do not negatively impact on the Reserve's primary purpose;
- Existence of, and likely impact on other Users of the Reserve;
- Implementation of appropriate tenure arrangements (for example, leases)
- Culture of health and safety among users in terms of their general behavior and use of the Reserves' facilities;
- Need for the Trustee to exercise prudent financial stewardship of the reserve within budget constraints and available resources; and
- Awareness of cultural heritage and native title.

It will be necessary for the applicant to address the assessment criteria showing that the proposed use meets the criteria set out in this Plan and will not adversely impact on the primary water purpose of the Reserve. In addition to the LMP requirements, any proposed development would be assessed under the *Natural Areas Overlay* defined in the Mount Isa City Plan.

Under the 2006 *Mount Isa City Plan* the land abutting the lake is contained within the *Rural Zone* and subject to the *Natural Areas and Scenic Rim* and *Riverine Corridors* overlay. Generally in the plan the rural area provides for a range of agricultural uses. All of the local government area provides for compatible tourism uses.

Any proposal for tourism development would be *impact assessable* in the *Rural Zone*.

Lake Moondarra has been identified in the plan and *is intended to be maintained as, an area of interest and recreational amenity to resident and visitor alike*.

Riverine Corridors require a 500 metre buffer from Lake Moondarra for any proposed development.



## 4.8 Site Usage and Scope

Amenity improvements and the establishment of relative commercial business will require impact assessment, MICC DA and building approval and MIWB long term lease. Lead time will be between six and 15 months. There is scope as discussed throughout this study. Key to this development is catalyst infrastructure such as a floating jetty, dock and moorings and a separate floating boat ramp and loading dock.

Completion of these projects will attract commercial tourism and user services such as café, camping sites and a caravan park and cabins. Sustainable café operations will depend, in simple terms, on an average of 150 to 200 cups of coffee and 100 sandwiches (or equivalent) per day while a caravan park will require occupancy of 30 to 50 percent depending on operational expenditure (opex) break even.

## 4.9 Arrival and Points of Entry

An upgrade of the Reserve entry signage will help increase the visitor experience. Development of themed signage across all aspects of the Reserve will increase visitor recall and promotional opportunities.

Figure 34: Lake Moondarra Arrival & Points of Entry Signage



Source: Pacific Southwest Strategy Group, 2016



## 5.0 TARGET AUDIENCE & INTEREST PROFILE

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### 5.1 Audience's Values and Lifestyles

Traditional methods of research define consumers by demographic and life-stage changes that assume everyone in the same age and same income bracket, act in the same way. This methodology produces major loss in advertising penetration and cost when trying to change minds in consumer groups. There is a more *productive* strategy in *understanding* consumer behaviour and to maximise the impact of the promotional spend called *Values and Lifestyle Analysis* (VALS).

Tourism Queensland has found the VALS system to be an effective tool to reach more adventurous travellers using this system by identifying their personality traits, values, attitudes, interests and lifestyle. In the case of Lake Moondarra, the following profiles sectors apply:

- **Active Explorers** - Holidays are about pushing boundaries through challenging themselves via physical activity. They enjoy the company of others, but their focus is on exploring the extremes of their physical environment and themselves. It's about feeling alive.
- **Stylish Travellers** - A holiday is a chance to demonstrate their achievements both to themselves and others. They do this by seeking out unique and exotic experiences and products, making them feel discerning, stylish and successful.
- **Self-Discoverers** - Holidays are about discovery, nourishment and enrichment of the self (physically and intellectually). They seek to immerse themselves in holiday experiences that deliver this, gaining insight or a sense of well-being.
- **Unwinders** - For Unwinders, holidays are all about relaxation and release, focusing on themselves as an escape from their busy lives. They seek an unstructured holiday. Decisions are made when at the destination. This allows them to catch their breath, feel calm and peaceful and gain perspective.
- **Connectors** - They see holidays as a chance to connect with the people they care most about. They will often compromise their own preferences in terms of activities to ensure everyone has a good time. It's about what is real and what's important.
- **Social Fun-Seekers** - The essence of their holiday is having a fun time. While they do a lot of different activities, it's sharing the experience with friends and other holidaymakers that makes the difference.<sup>[1]</sup>

These VALS sectors are most relevant to Outback Tourism if linked with adventure and experiences values and lifestyle such as camping, outback wilderness, boating, birding, fishing and walking trails. MIETV and MIRAC should consider include this concept when planning their spend potential.

Using this concept, the following table was used to calculate the potential visitor capture by region:

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<sup>[1]</sup> Tourism Queensland website, 2009. Understanding Our Consumers - TQ Domestic Market Segmentation. [http://www.tq.com.au/tqcorp\\_06/marketing/understanding-our-consumer---tq-domestic-market-segmentation/understanding-our-consumers---tq-domestic-market-segmentation\\_home.cfm](http://www.tq.com.au/tqcorp_06/marketing/understanding-our-consumer---tq-domestic-market-segmentation/understanding-our-consumers---tq-domestic-market-segmentation_home.cfm)

Table 2: Tourism Queensland Domestic Market Segmentation						
Category	VALS Share	Population				Total By Type
		Mount Isa Locals	Mount Isa Visitors	Qld Residents	Qld Visitors	
Active Explorers	11%	2,477	4,400	608,090	220,000	734,967
Stylish Travellers	5%	1,126	2,000	230,950	100,000	334,076
Self-Discoverers	12%	2,702	4,800	554,280	240,000	801,782
Unwinders	15%	3,377	6,000	692,550	300,000	1,002,227
Connectors	32%	7,205	12,800	1,478,080	640,000	2,138,085
Social Fun-seekers	25%	5,629	10,000	1,154,750	500,000	1,670,379
TOTAL by Region	100%	22,516	40,000	4,619,000	2,000,000	6,681,516

Source: Pacific Southwest Strategy Group Pty Ltd, 2016 based on population figures - MIETV, modelling

The above table suggests the potential for Lake Moondarra visitors per annum if promotional activities focus on applicable lifestyle sectors such as Active Explores, Self-Discoverers and Unwinders.

## 6.0 DEVELOPMENT OPTIONS

### 6.1 SWOT Analysis

The SWOT analysis is an effective tool to segment issues internally (strengths and weaknesses) and externally (opportunities and threats):

- Strengths – things we do better than our competitors;
- Weaknesses – things we do not do, or do not do well;
- Opportunities – things that provide promise; and
- Threats – issues or things which are generally outside our control, but which if implemented would impact on our performance.

**Table 3: LMRA Commercial Development Opportunities SWOT**

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>- Large bird population</li> <li>- Major reliable fishing precinct</li> <li>- Major stop off for Asian migratory birds in summer</li> <li>- Expansive water sports haven</li> <li>- High user clubs member utilisation</li> <li>- Successful fish stocking association</li> <li>- Trip advisor “very good” rating (impressive)</li> <li>- Kalkadoon rock carving</li> <li>- Close to major outback city (pop 2 mill)</li> <li>- 2 x grazing areas (off lease)</li> <li>- 2 x quarry leases</li> </ul>	<ul style="list-style-type: none"> <li>- Lack of shade (trees/sails/shelters)</li> <li>- No fencing, multiple dirt track entry</li> <li>- “Uncontrollable” invasive weed problem</li> <li>- Illegal camping at the Junction</li> <li>- No on-site F&amp;B service</li> <li>- Formal arrival points lacking at all entry points</li> <li>- Confusion signage – lack of quality, themed signage across various sites</li> <li>- No pontoons or anchored platforms</li> <li>- Walking trails need upgrading</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>- Caravan/RV Park &amp; Cabins</li> <li>- Café and kiosk re-opening</li> <li>- 24/7 site access</li> <li>- Youth camp refurb</li> <li>- Anchored deep water pontoons</li> <li>- Floating jetty, moorings &amp; floating dock</li> <li>- Themed signage</li> <li>- Limit access entries to LMRA</li> <li>- Signpost Rec Area</li> <li>- Define Rec Area boundary with bollards, timber wast to 50-80 Ha</li> <li>- Introduce new leases for mobile sporting club (motor vehicle, motor bike, mountain bikes) to provide greater community presence</li> <li>- Add picnic shelters in cluster formation (ref case study)</li> <li>- Bird watching centre &amp; viewing hides</li> <li>- Establish bush camps (isolated/no services, camping attached to caravan park)</li> <li>- Introduction of wave machine for surfing, belly boards etc</li> </ul>	<ul style="list-style-type: none"> <li>- Litter, vandalism &amp; illegal entry issue</li> <li>- Poor signage safety risk – directional, safety, instructional, site maps, rest, toilets, showers, parking, rubbish bins, emergency assembly points</li> <li>- Water depth in drought created emerged water hazards</li> <li>- Deterioration of shade cover throughout LMRA</li> </ul>

Source: Pacific Southwest Strategy Group, 2016



## 6.2 Site and Product Options

Table 4: Lake Moondarra Strategy Issues and Opportunities Analysis

Long List	Source							Category of Analysis							SWOT				Support			Action				Comments	
	Secondary Data	Community Meeting	Stakeholders	On-Site @ Moondarra	Users & Lessees	Individuals	Pacific Southwest	Opinion/ Not Relevant	Current Constraint /Condition	Issue	Gap = Not Yet Provided	New/ Recycle Area/s	Lifestyle Target Sector (1)	Project (Pj)/ Program (Pg)	Strength	Weakness	Opportunities	Threat	Community	Govt - AUS, QLD LGA	Local Industry & Suppliers	Lead Time - in months (S<6,M6-12,L>12)	Priority (H,M,L)	Go/No	Ease of Application (H,M,L)		
Column #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
SECURITY & SAFETY OPPORTUNITIES (N.30):							✓																			As more visitors stay onsite longer will reduce misbehaviour, vandalism and littering higher security is a fact of life	
Surveillance CCTV		✓			✓	✓	✓		x		✓	N	A	Pj		x		x	✓			M	H	Go	D	Entry points/ back to base supported by signage and LMRA website	
Shade Tree Planting		✓	✓	✓	✓	✓	✓		x	✓		R	A	Pg		x	✓	x	✓	✓		L	H	Go	M	Major Issue replace old trees to increase shade cover	
Shade Cloth		✓	✓	✓	✓	✓	✓		x	✓		N	A	Pg		x	✓	x	✓	✓		S	H	Go	M	Protect against major problem of sunburn	
Noxious Weed Control		✓	✓	✓	✓	✓	✓		x	✓	✓	R	A	Pg		x	✓	x	✓		✓	M	M	Go	D	Major issue. Appears that weed harvester is insufficient counter measure	
Emergency Phone Numbers (Mt Isa Only)	✓	✓					✓		x	✓		N	A	Pj		x		x	✓			M	H	Go	L	Only off-site emergency numbers eg. Police, ambulance, fire	
Replace Jagged Rocks Along Waters Edge with S/Stone		✓	✓	✓	✓	✓				✓	✓	N	A	Pj		x	✓	x	✓			L	M	Go	M	Rec area boat ramps	
Concrete Canoe Pathway		✓	✓	✓	✓	✓	✓			✓	✓	N	S	Pj			✓		✓			M	L	Go	L	Provider user with tenure ie. 10 years	

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Column #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
Ski Area Flood Lighting		✓	✓		✓	✓				✓	✓	N	S	Pj		x	✓		✓			L	L	Go		Land & water course	
Feral Animal Eradication	✓						✓		x	✓	✓	N	A	Pj		x		x				M	H	Go	M	Sub-contract qualified shooter	
Water Craft Safety Speed Limits, Vest Regulations	✓						✓			✓	✓	N	A	Pj		x		x				S	H	Go	L	All entry conditions/ regulatory issues on LMRA website	
Personal Watercraft Regulations & Operations	✓						✓			✓	✓	N	A	Pj		x		x				S	H	Go	L	Accessible on LMRA website	
Smart Phone WiFi Hot Spots		✓			✓	✓			x	✓	✓	N	A	Pj		x	✓	x	✓	✓		M	H	Go	L	Primary need is communication. Will also ensure youth can interact & will encourage their participation at Moondarra	
Litter & Rubbish Management									x																	Litter is a turn off for majority of visitors including locals. Clear signage as to litter dumping laws, also set out on LMRA website with penalties	
Reliable Lighting in Rec Areas for Evening Sports		✓	✓		✓	✓	✓		x	✓	✓	N	A	Pj		x	✓	x	✓		✓	M	H	Go		Major interest in extended after-hours or 24/7 access and is recommended	
Water Quality Monitoring		✓								✓	✓	N	C	Pg		x	✓	x				S	M	Go	L	Extensive work done every day by Water Board & reported on website. Perhaps need to publicise to emphasise results to community. Need to reassure locals & tourists of water quality regularly via signage board	
Better Management of Water Weed		✓	✓		✓	✓	✓		x	✓	✓	R	S	Pg		x	✓	x				S	H	Go	L	Concern by triathlon Club	

Table 4: Lake Moondarra Strategy Issues and Opportunities Analysis

Long List	Source							Category of Analysis							SWOT				Support			Action				Comments	
	Secondary Data	Community Meeting	Stakeholders	On-Site @ Moondarra	Users & Lessees	Individuals	Pacific Southwest	Opinion/ Not Relevant	Current Constraint /Condition	Issue	Gap = Not Yet Provided	New/ Recycle Area/s	Lifestyle Target Sector (I)	Project (Pj)/ Program (Pg)	Strength	Weakness	Opportunities	Threat	Community	Govt - AUS, QLD LGA	Local Industry & Suppliers	Lead Time - in months (S<6,M6-12,L>12)	Priority (H,M,L)	Go/No	Ease of Application (H,M,L)		
Column #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
Remove Broken Trees and Replant		✓			✓	✓			x	✓	✓	R	A	Pg		x	✓		✓			S	L	Go	L	Improve watering frequency in LMRA	
Weed Control & Removal of Waste Organic Matter		✓			✓	✓			x		✓	R	A	Pg		x	✓		✓			S	L	Go	L	Ground maintenance matter	
Shade Major Safety Issue – Need More		✓			✓	✓			x	✓	✓	N	A	Pj		x	✓	x	✓			M	H	Go	L	To avoid sunburn	
24/7 Access to Rec Area in Summer	✓	✓	✓	✓	✓	✓	✓		x	✓	✓	N	A	Pj		x	✓	x	✓			M	H	Go	M	Considered to be major well-being issue as temps can be 40°C at 10pm – esp for young families. Last light in summer is 9.30 pm. Lock out is 10 pm but pack down of ski boat or picnic table takes 45 mins	
Shaded Pontoon	✓	✓	✓		✓	✓			x	✓	✓	N	A	Pj		x	✓	x	✓			M	H	Go	M	To prevent sunburn & heatstroke. Also an amenity issue for swimmers	
Dedicated Swimming Area		✓			✓	✓				✓	✓	N	S	Pj		x	✓		✓			S	M	Go	L	Major safety issue & needs longer area for triathlon training	
Shaded Seating		✓							x	✓	✓	N	F	Pj		x	✓	x	✓			M	L	Go	M	Separate from Shelter.	
Remove Access Restriction to Quantified Rec Areas		✓	✓		✓	✓				✓	✓	N	A	Pj		x	✓	x	✓			M	H	Go	L	10 pm closure is only half hour after full dark	
Weed Control		✓			✓	✓			x	✓	✓	R	A	Pg		x	✓	x	✓			S	H	Go	H	People won't swim in weed	
Allow Night Access	✓	✓	✓		✓	✓				✓	✓	N	A	Pj		x	✓	x	✓			M	H	Go	M	To prevent sunburn	
Lifeguard Service		✓																								Many requests to reintroduce	
No Locked Gates at Night		✓	✓		✓	✓			x	✓	✓	R		Pg		x		x			✓		L		M	Would require new security access such as a card reader for members & day visitors for	



Table 4: Lake Moondarra Strategy Issues and Opportunities Analysis

Long List	Source							Category of Analysis							SWOT				Support			Action				Comments	
	Secondary Data	Community Meeting	Stakeholders	On-Site @ Moondarra	Users & Lessees	Individuals	Pacific Southwest	Opinion/ Not Relevant	Current Constraint /Condition	Issue	Gap = Not Yet Provided	New/ Recycle Area/s	Lifestyle Target Sector (1)	Project (Pi)/ Program (Pg)	Strength	Weakness	Opportunities	Threat	Community	Govt - AUS, QLD LGA	Local Industry & Suppliers	Lead Time - in months (S<6,M6-12,L>12)	Priority (H,M,L)	Go/No	Ease of Application (H,M,L)		
Column #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
																										annual fee. Similar to card keys for hotels	
Requests for MIWB Ranger & Staff On-Site Presence			✓	✓		✓	✓			x	✓	✓	N	-	Pg		x	✓	x	✓			S	M	No	D	On-Site staff limited to day shifts due to safety issue. Gate closed at 10pm but this is not stopping late night trespassing
Control Unauthorised Camping			✓	✓		✓	✓			x	✓	✓	N	A	Pj		x	✓	x	✓	✓		S	H		L	Fence off the Junction (except during peak season)
COMMERCIAL OPPORTUNITIES IN REC AREA (N.24):																										Based on list of possible business development suggestions	
Outdoor Café with Shade, Tables & Chairs			✓	✓	✓	✓				x	✓		R	A	Pj		x	✓	x	✓				H			Canoe Club
BBQ Boats - Hire			✓	✓							✓		N	A	Pj		x	✓		✓				H			Self-drive
Kiosk/Warrina Park - Shade, Tables & Chairs			✓	✓		✓					✓		R	A	Pj		x	✓		✓				L			Warrina Park - long term
Camp Kitchen			✓	✓		✓							N	C	Pj		x	✓		✓				H			Identify new site/s
Bush Camp Establishment			✓	✓		✓		✓			✓		N	A	Pg		x	✓		✓				H			Isolated but in walking distance from car park & Transport Bay Rec Area
House Boat Hire			✓	✓		✓					✓		R	T	Pj		x	✓		✓	✓			M			Will need land base
Caravan Park & Cabins		✓	✓	✓		✓	✓			x	✓	✓	N	A	Pj		x	✓	x	✓	✓		✓	H	Go	H	Relocation of existing huts must be carefully considered as floor plan fitout for mines workers is unsuitable for tourists & families
Party Boats (with Music DJ)			✓	✓						x	✓		N	L	Pj		x	✓		✓				H			Larger vessel with Licenced Captain

Long List	Source							Category of Analysis							SWOT				Support			Action				Comments	
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Bird Watching Centre, Field Guides/aps, Cameras, Tripods, Slopes, Binoculars etc			✓			✓		✓		x		G	N	S	Pg			✓					M				Specialist crew - major opportunity but will be slow start-up
Bait & Tackle Hire (sale)			✓					✓		x			N	A	Pj			✓		✓			M				Included in café for locals and tourists
Moondarra Wildlife, Nature & Education Guides						✓						G	R	S	Pj			✓					L				Limited demand - early stages
Boot Camp Training Facility				✓		✓							N	S	Pj			✓		✓			L				To include tracks, course & camp site
Equipment Hire (Skis, SUP Boards, Canoes, Parasails, Paddle Boats, Fishing Boats, Scooters, Skateboards etc)				✓		✓				x			N	S	Pj			✓									For tourists & locals without boats or equipment
Swimming Enclosure			✓	✓	✓	✓				x	✓		R	A	Pg			✓		✓	✓	✓		H			Upgrade, weed free, managed by on-site user
Tri & Other Squad Training Camps			✓	✓		✓				x	x		N	S	Pj			✓		✓			H				Development opportunity
Internet and Smart Phone Hot Spots				✓		✓	✓	✓		✓	✓	✓	N	A	Pj		x	✓	x	✓			S	H	Go	D	Essential for people on call
Floating Jetty, Moorings & Loading Dock			✓	✓	✓	✓		✓		x	✓		N	A	Pj		x	✓	x	✓			H				Houseboats, BBQ, day boats, dance boats, water sports, eco tours, floating deck essential (as loading dock) for water level variations
Floating Boat Ramp & Loading Dock			✓	✓	✓	✓				x	✓		N	A	Pj		x	✓		✓		✓	H				Counter water level variations. Many users support pontoons. Required as loading dock for

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																										private/hire/commercial craft. Also has safety benefits.	
Multi-Purpose Concrete Pads for Hand-ball, Hopscotch & Cricket Pitch Club Membership Drive		✓	✓	✓	✓				x			N	A	Pj			✓		✓		✓		H				
Consider Iconic Welcome Sign to Bird Watchers		✓	✓	✓	✓	✓	✓		x		G		A	Pj			✓			✓			H			L	Seek sponsorship from Birdlife Australia including link to website & local bird species
Arrange Famil Tours of Lake Moondarra & all Key Attraction Points for Tourism & Business Entities (ie. MIETV Outback @ Isa Staff etc)		✓	✓		✓		✓			x		N		Pg			✓						H		L	Famil tours especially important as issue of selective commercial options for Lake Moondarra are being considered.	
Fish Stocking Hatchery Promotion		✓	✓		✓		✓			x		N		Pg			✓						H			Excellent opportunity to raise Lake Moondarra brand profile	
Youth Camp Refurb. Needs Wilderness Renaming Relative to Site or Cultural Icon		✓	✓									R	A	Pg			✓		✓	✓						Now MICC project, work currently in progress. Will be popular drawcard & assist café trade	
Wave machine for board riding, belly boards, inflatable mats						✓			x		G	N	A	Pj			✓					L	L		H	Concept highly commercial in highly populated areas throughout Asia	
SIGNAGE OPPORTUNITIES (N.24):																										Essential quality, informative, themed signage replaces existing	



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Column #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
Condition of Entry Signage Lake Moondarra & Website	✓		✓				✓		x	✓	✓	N	A	Pj		x		x				G	H	Go	L	Signage & smart phone access on-site	
Directional	✓	✓	✓	✓	✓	✓	✓		x	✓	✓	N	A	Pj		x				✓		M	M		L	Inadequate and poor quality. Needs major theming & replacement. Use universal sign standards. Refer Lake Awoonga examples	
Danger/ Warning Notices	✓	✓	✓						x	✓	✓	N	A	Pj		x	✓			✓		M	M		L	Incl. water, land, reptiles etc	
Behaviour & Unintended Consequences	✓	✓	✓		✓	✓	✓			✓	✓	N	A	Pj		x	✓			✓		S	H		D	Disorderly conduct, annoyance, intoxication, vandalism	
Conditions of Entry	✓	✓	✓							✓	✓	R	A	Pj	✓					✓		M	H		H	Need to be elaborated	
Water Safety	✓	✓								✓		R	A	Pj	✓					✓		S	M			Universal standard signs	
Swim Areas	✓	✓								✓		R	A	Pj	✓							S	L		H	Universal standard signs	
Restricted Areas	✓		✓				✓			✓		R	A	Pg		x	✓					S	H			Increased fixtures	
Personal Safety & Procedures	✓	✓							x	✓		N	A	Pj		x	✓					S	H		H	Phone numbers etc	
Use of Watercraft	✓									✓		R	A	Pj	✓							S	M			Universal standard signs	
Speed Limits	✓									✓		N	A	Pj	✓							S	L			Universal standard designs	
Safety Equipment		✓								✓		?	A	Pj		x	✓	x				S	L			Universal standards & details at ramps	
Emergency Contacts (Fire, Flood, Storms)	✓	✓	✓						x	✓	✓	N	A	Pj		x	✓	x				M	M		H	All entry & rec areas – all off-site emergency contacts	
Hire Equipment Usage		✓			✓	✓	✓			✓	✓	R	M	Pj								M	L		L	Universal standards for rec areas	
Licensed Hire Operators		✓			✓	✓			x	✓		R		Pj	✓		✓					M	L		L	Should be promoted	

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No Domestic Pets (Cats, Dogs, other)			✓	✓				✓			✓		R	L	Pj								S	H		H	Major issue - needs greater oversight	
Designated Camp Areas		✓	✓			✓	✓			x	✓	✓	N	A	Pj		x	✓					S	H		H	Once agreed, will require official policing. Camping currently illegal	
Designated Parking & Boat Trailer Areas		✓	✓	✓		✓	✓				✓		R	A	Pj			✓					S	M		D	Proximity to Black Rock Ski Club	
Health Warning (Lice, blue Green Algae, Reptiles etc)		✓	✓	✓		✓	✓	✓		x	✓	✓	N	A	Pj		x	✓					S	H		D	Refer Lake Awoonga Signage	
Fire Restrictions (ie. no open fires, fire places only, no timber gathering)			✓			✓		✓			✓	✓	N	C	Pj		x	✓	x	✓			M	H	Go	L	Ensure camping & campfire examples within approved, constructed fire pits in rec areas	
Refurbish; Bright, Up-to-Date With Colour			✓			✓	✓				✓	✓	N	All	Pj		x	✓	x	✓	✓		M	H	Go	H	Use with uniform design & brand	
Signage Maps. Trails, Rec Areas, Boat Ramps, Bird Watching Hides etc			✓		✓	✓	✓			x	✓	✓	N	All	Pj		x	✓	x	✓	✓		M	H	Go	D	Existing signs inadequate in number & detail. Need to highlight rec areas such as Black Rock & Clear Water Lagoon and distance to toilets, mobile pie van, cafe	
Existing Signage Outdated & Statistics Need Updating			✓			✓	✓				✓	✓	N	All	Pj		x	✓	x	✓	✓		M	H	Go	D	Major refurb of all signs	
Maps for Special Interest Groups such as Bird Watchers			✓			✓	✓			x		✓	N		Pj			✓					L	L		L	ie. Bird watcher hides, Clearwater lagoon , sites on western side	
INFRASTRUCTURE (N.28)																												
Bike Lane - City to Lake			✓	✓		✓					✓		N	A	Pj			✓		✓				M				New construction along public road

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Mountain Trails/ Bike Track			✓	✓		✓		✓		x	✓		N	S	Pj		x	✓		✓				H			New Club (Stack City MTB has 168 members & growing). Urgently needs designated area & track construction
Bird Watching Hides			✓	✓	✓	✓		✓		x	✓		N	S	Pj			✓		✓	✓	✓		H			Clear Water Lagoon – major tourist opportunities – new construction
Tree Plantings			✓	✓	✓	✓		✓		x	✓		N	A	Pj		x	✓	x	✓				H			Shade major issue
Walking/Hiking Tracks			✓	✓		✓					✓		N	A	Pj		x	✓		✓				M			Need for several new tracks
Cross Country Courses			✓	✓		✓								S	Pj			✓		✓				H			Need formal measured course
Canoe Club Floating Jetty			✓	✓		✓		✓		x	✓		N	A	Pj		x	✓		✓				H	Go		Major project – major fundraising task
Wallaby Walk			✓			✓							N	A	Pj			✓		✓				M			Need upgrade (widening) & greater stability
Camping Sites			✓	✓	✓	✓		✓		x	✓		N	A	Pj		x	✓	x	✓				H			Requires further investigation
Electricity/ Mains Power			✓	✓	✓	✓		✓		x	✓		R	A	Pj		x	✓	x	✓	✓	✓		H			Needs MIWB support
Cable Skiing			✓			✓							N	S	Pj			✓		✓				L			Need for 100% reliability
Showers/Toilet Blocks Upgrade			✓	✓	✓	✓		✓		x	✓		R	A	Pg		x	✓	x	✓	✓	✓		H			Upgrade essential especially for female use
Rangers Office			✓								✓		N	A	Pj		x		x	✓				L	No		Unlikely due to cost. Service could be provided by commercial entity such as caravan park
Dry Storage Security			✓	✓	✓	✓					✓		N	A	Pj		x	✓		✓				L			Important issue – fencing & shed if possible
Dedicated swim lanes			✓	✓	✓	✓		✓		✓	✓		N	A	Pj			✓		✓				H			Cleared of weed/ land access



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More children’s swings			✓			✓							N	A	Pj			✓		✓			M				Under full shade
Greener grass			✓										R	A	Pj			✓		✓			H				Regular watering
Disability Access			✓	✓	✓	✓		✓		x	✓		N	S			x	✓	x	✓			H				Toilets, change rooms, stairs
Upgrade Walking Trails			✓	✓	✓	✓							N	A	Pj			✓		✓			H				Quality walks will attract numbers
Upgrade Key Roads & Crossings			✓	✓	✓	✓					✓		N	A	Pj							✓	L				Council matter
Increased Cement Pathways for Kids Scooters, skate boards			✓	✓	✓	✓					✓		N	A			x	✓	x	✓			M				Referenced by all users
Disability Access Near Ski Club Toilets & Change Rooms			✓	✓	✓	✓				x	✓		N	A	Pj		x	✓	x	✓			H				Currently disadvantages some 150-200 members & disabled persons. Replaces steps/railing recently removed by MIWB
More Lighting Sports Area			✓	✓	✓	✓				x	✓		N	A	Pj		x		x			✓	H				Improved coverage
Night Ski Lighting																											Need feasibility & costing study
Walk-way to Spillway			✓	✓	✓	✓				x	✓		N	A	Pj			✓					L				
Raise Spillway Wall to Extend Town/Mine Water Capacity			✓										N					✓					M				Essential to meet town water demands and LMRA watering needs
Bike Path Transport Bay to Kingfisher Point			✓		✓								N	S	Pj			✓		✓			L				
Public Transport				✓		✓				x			N	A			x										Limits tourism numbers
EVENT OPPORTUNITIES (N.16):																											
Water Ski Competitions			✓	✓	✓	✓							R	S	Pg		x	✓		✓			M				Amenity improvements required

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Mountain Bikes			✓	✓	✓	✓							N	S	Pg			✓		✓				H			MIRA could benefit from café trade
Dirt Bikes (Motor)			✓	✓	✓	✓							N	S	Pj		x	✓		✓				M			Formal course required
Triathlons (swim, bike, run)			✓	✓	✓	✓					✓		N	S	Pg			✓		✓				H			Could include camping during events. Major growth sport, deserves support. Attracts all ages
Angling (inc. Fly Fishing) Competitions			✓	✓	✓								R	A	Pj			✓		✓				H			Current comp successful. Need more regional comps.
Orienteering/ Ironman			✓	✓	✓								N	S	Pg			✓		✓				H			New sports opportunity
Kayak, Canoe, SUP Events			✓	✓	✓	✓					✓		R	A	Pg												New sports opportunity
Adventure Trail Competitions			✓				✓						N	A	Pj			✓		✓				L		L	Low-cost establishment. Based on major track elsewhere & includes hiking, swimming & kayaking
Bird Watching Muster							✓	✓				✓	N	S	Pg			✓						M		L	Annual bird count by species plus opportunity for Local, State, National conferences
Jet Ski Competitions							✓	✓		x		✓	N	S	Pg			✓		✓				M		L	
Basket Ball Courts			✓	✓		✓	✓			x			R	A	Pj			✓		✓				H		L	Upgrade ½ courts including line marking
Guided Wallaby Feeding	✓		✓	✓			✓					G	R	A	Pg			✓		✓				H		M	Site TBA
Event Accommodation			✓			✓	✓			x	✓	G	R	A	Pg			✓		✓				H		M	Temporary camping sites in addition to proposed areas
Guided Endemic Bird & Wildlife Watching Walk	✓		✓			✓	✓					G	N	S	Pg			✓		✓				H		L	Including birds, reptiles along know bird habit/roosting area (bowerbird, kingfishers, waders)

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Music Concerts		✓	✓		✓					x					✓		✓		✓				M			Alternative venue for Mount Isa
Dances		✓	✓	✓	✓							N	A	Pj	✓		✓		✓				M			Easy start-up
REPAIRS & MAINTENANCE (N.4):																										
Weed Eradication		✓	✓	✓	✓		✓		x	✓		R	A	Pg		x	✓	x	✓				H			Budget issues prevent hiring of licensed operator. Incl. Leichhardt River
Rubbish Removal Upgrade		✓	✓	✓	✓					✓		N	A	Pg		x	✓	x	✓				H			More frequent rubbish removal service. Currently MIWB responsibility. Consider sub-contracting to MICC
Rec Area Mowing & Edging		✓	✓	✓	✓					✓		R	A	Pg		x		x	✓				H			
Weed Harvester Operations		✓	✓	✓	✓		✓		x	✓		R	A	Pg		x		x	✓				H			Need regular use with fully trained & licenced operator (paid & volunteers). Sub-contract if necessary
LMRA COALITION PLANNING (n. 12):																										
LMRA Management Plan (5 years/10 years)			✓				✓		x	✓		R	A	Pj		x	✓	x	✓		✓		H		M	Users/leases want reassurance
LMRA User Management & Ops Plan			✓		✓		✓		x	✓		R	A	Pj		x	✓	x	✓		✓		H		L	Helps with planning & development with private/public sectors & needed for commercial start-ups
LMRA Separation of Tasks/ Responsibilities			✓		✓		✓		x			N	A	Pj			✓		✓		✓		H		H	Between MIWB & Coalition Management. Will clarify users tasks assuming they have users



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MIWB Five Year LMRA CSO Strategy			✓				✓		x	✓		N	A	Pj			✓		✓		✓		H		L	Public commitment for Coalition grant applications	
LMRA User Quarterly Joint Meetings			✓		✓		✓		x	✓	G	N	A	Pj			✓		✓		✓		H		L	Improve communications between all parties	
LMRA Brand Strategy		✓	✓		✓						G	N	A	Pj			✓		✓	✓	✓		H		L	See branding. Developed in conjunction with tourism, Council, State Development, MITEZ	
LMRA CSO Plan			✓		✓	✓	✓		x	✓	G	N	A	Pj		x	✓	x	✓			S	H		L	Cost key project to enable fundraising strategies	
LMRA Venue, Events & Attraction Plan	✓	✓	✓		✓		✓		x	✓	G	N	A	Pg			✓		✓	✓		L	M		M	Work with MIETV	
LMRA Grant/Funding Applications	✓	✓	✓	✓	✓	✓	✓		x	✓	G	N	A	Pg		x	✓	x	✓	✓	✓	S	H		L		
LMRA Signage Plan	✓	✓	✓	✓	✓	✓			x	✓	G	N	A	Pg		x	✓		✓			L	H		H	Need major overhaul and assignment with new by-laws & use standard graphics/theming	
Assess Camp Village Bush Camp Site Options		✓	✓		✓		✓		x	✓	G	R	A	Pj		x	✓	x				L	M		L	Close to existing amenities (preferable). Possibly near youth/ astronomy sites	
Feasibility Study for Caravan Park		✓	✓		✓	✓	✓		x	✓	G	R	A	Pj		x	✓	x	✓						H	Need capex/opex modelling including business plan	
BRAND & PROMOTION OPPORTUNITIES (N.8):																										Marketing Lake Moondarra to tourists consistent with that brand ie. Lake Moondarra - Mount Isa’s Playground	
Events Strategy Development			✓				✓			✓	G	N	A	Pj		x	✓		✓				H			to incl. Jetty; Sponsorship; Use of Tags such as “Good Place to Visit”; “Cool Place to Camp”	

Long List	Source							Category of Analysis							SWOT				Support			Action				Comments	
	Secondary Data	Community Meeting	Stakeholders	On-Site @ Moondarra	Users & Lessees	Individuals	Pacific Southwest	Opinion/ Not Relevant	Current Constraint /Condition	Issue	Gap = Not Yet Provided	New/ Recycle Area/s	Lifestyle Target Sector (1)	Project (P1)/ Program (Pg)	Strength	Weakness	Opportunities	Threat	Community	Govt - AUS, QLD LGA	Local Industry & Suppliers	Lead Time – in months (S<6,M6-12,L>12)	Priority (H,M,L)	Go/No	Ease of Application (H,M,L)		
Column #	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
Brand Strategy Development			✓		✓		✓		x		G	N	A	Pj			✓		✓				H			Create destination brand	
Promote LMRA Venue			✓	✓		✓					G	N	A	Pj			✓						M			Local, State, National	
Attract large Scale Sporting Events			✓	✓			✓				G	N	A	Pj			✓						H			Including major & hallmark events	
Branding Awareness by Blogging			✓				✓				G	N	A	Pg			✓		✓				M			Seek volunteers& school seniors work experience	
Tourism Focus			✓	✓		✓		✓				G	N	A	Pg			✓		✓				H			Currently missed opportunity including camping at 2 sites. Will need collective approach supported by Industry, Council and MIETV
Friends of LMRA			✓	✓	✓	✓		✓						A												Create LMRA Club membership & benefits. Annual fee paid to MIRAC Coalition	
Phone Hot Spots			✓	✓	✓	✓	✓		x		G		A	Pj		x	✓				✓		M		L	Will increase stays & visitations	

Legend: Ma = Major; Mi = Minor

✓ = positive

X = negative

Column 13: New/ Recycle Area/s - N = New; R = Recycle; OK = ✓

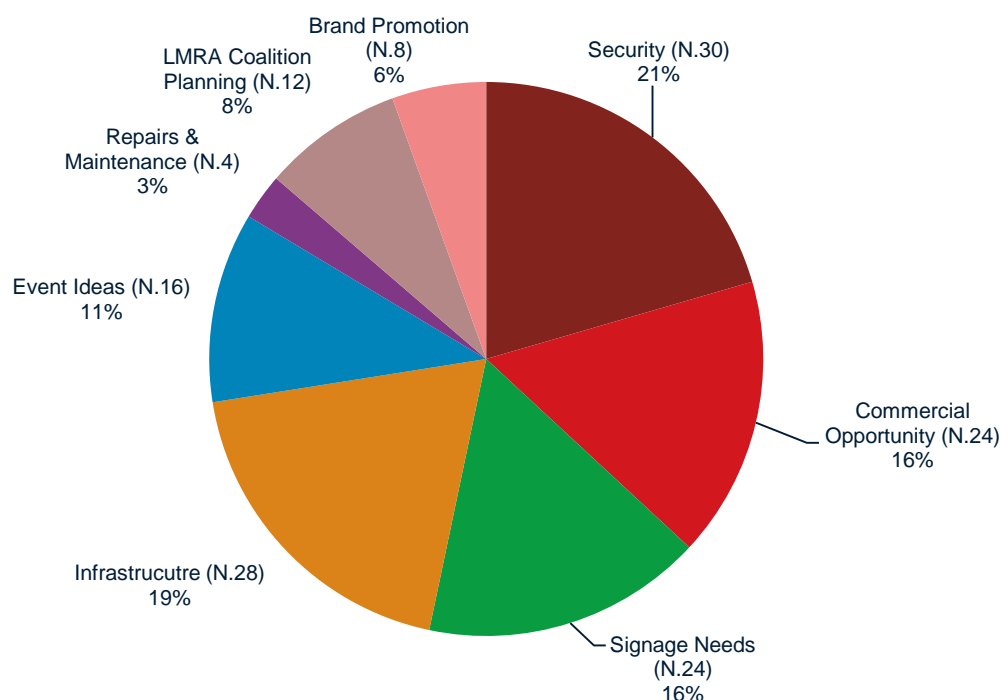
Column 14: Lifestyle Target Sector - L = Locals; S = Special Interest; F = Family; C = Campers; W = Watercraft; T = Tourists;

A = All

Column 20: Lead Time - S = Short (<6 months); M = Medium (6-12 months); L = Long (>12 months)

Column 21: Priority & Column 23: Ease of Application - H = High; M = Medium; L = Low

Figure 35: Summary of Issues & Opportunities by Sector



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

The following table shows that 80 percent or over half of the 146 ideas were constraints, a result of many causes, primarily lack of amenity improvement. It is suggested that in future the responsibility of these improvements should be delegated by arrangement with MIWB to a coalition of partners with access to grants, funding and sponsorship.

#	Description	Constraint %	Constraint No.s	Total Sector No.'s
1	Security & Safety	66.7	20	30
2	Commercial Opportunity	58.3	14	24
3	Signage Needs	45.8	11	24
4	Infrastructure	64.3	18	28
5	Event Ideas	18.7	3	16
6	Repairs & Maintenance Issues	50.0	2	4
7	LMRA Coalition Planning	75.0	9	12
8	Brand Promotion	37.5	3	8

Source: Pacific Southwest Strategy Group Pty Ltd, 2016





## 7.0 OPPORTUNITIES ASSESSMENT

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### 7.1 Project Readiness

The long list of projects were graded primarily by importance, perceived demand and readiness for development.

Key to the analysis was the grading of projects into *readiness* categories:

- **Blue Sky:** An idea without any research or development work undertaken. Major work required.
- **Pre-feasibility:** Some research, planning or development work completed or in progress for early determination.
- **Feasibility:** Extensive research, planning, development tasks completed including capex costs, opex, five year sales forecasts, profit and loss forecasts to EBITDA.
- **Awaiting Funding:** Feasibility established, detailed business planning completed and business case prepared.
- **Committed:** Project funding agreed, time frames, preliminary DA, regulatory documentation and site selection in train or approved.
- **Build & Operate:** Construction or refurbishment in progress, marketing plan and operational start date defined.

The very nature of the consultation process was to encourage innovation and creativity that typically favours “blue sky” ideas. As the ideas were processed, a number of commercial ideas diminished at the end of each stage of processing which in turn reduced investment risk.

The Lake Moondarra long list included concepts ranging from wildly imaginative and costly to simple and practical that could be implementable using existing resources. The grading framework scored some ideas high and others low due to criteria selected.

Commercial opportunities:

Other enabling factors related to the following influencers:

- Consumers – tourism tastes experience and interest;
- Residents/ locals – liveability in desert climate, lifestyle and escape from the city;
- Owner and Operators – Policies of MIM, MIWB, and MICC;
- Service providers – site users, accommodation, food and beverage;
- Service receivers – MICC, MIM, other;
- Investors – owners, leasees, group operators.

## 7.2 Weighting Factors

In evaluating the LMRA *commercial* opportunities, the importance, intensity of impact in terms of each opportunity was also influenced by:

- Local families liveability needs;
- Amenity improvement to international standard;
- Investment grade appeal; and
- Brand identity.

The weighting factor scale for each idea also considered the attractiveness to investors and operators.

Figure 36: Project and Program Weighting Factor Matrix

		Importance to Operations			
		Low	Medium	High	Very High
Spread of Impact	International	1	2	3	4
	Interstate	2	3	4	5
	Intrastate	3	4	5	6
	Local	4	5	6	7

Source: Pacific Southwest Strategy Group Pty Ltd, 2016

The above figure sought to highlight the more sustainable ideas, impact on LMRA and appeal to the lifestyle of visitors.

The final grading score for each idea was calculated by multiplying its enabler score (ref table 8) by the weighting factor. For example,  $30 \times 6 = 180$ . The ideas that scored in the green area of the matrix were seen to have development potential, while those scoring in the red area were unlikely to progress. Items in the orange area may or may not progress.

## 7.3 Priority Projects and Programs

Using this methodology, each project/program scored between 40 and 280. A high result represented a desirable *commercial* initiative capable of achieving sustainability.

The top 24 projects/programs (out of a total of 146) were as follows:

Rank	Ref #	Description	Project/Program	Status	Factor	Idea Enab/lers	Score
LEVEL 1 PRIORITIES:							
1	1.01	Floating jetty, moorings & loading dock	Pj	BS	7	40	280
2	1.02	Bush camp establishment	Pj	BS	7	40	280
3	1.03	Floating boat ramp & loading dock	Pj	BS	7	40	280
4	1.04	Internet & smart phone hot spots	Pj	BS	7	40	280
5	1.05	Café (Canoe Club) – shade, tables, chairs	Pj	BS	7	40	280
6	1.06	Party boat (with DJ)	Pj	BS	7	40	280
7	1.07	Wave Machine for board riding, belly boards, inflatable mats	Pj	BS	7	40	280
8	1.08	Caravan/ RV park & cabins	Pj	BS	6	40	240
9	1.09	Kiosk/Warrina Park – shade, tables, chairs	Pj	BS	6	40	240
10	1.10	Swimming enclosure (existing one needs weed removal, swimming lane with sun shade rest at each end)	Pg	AF	7	30	210
11	1.11	Triathlon & other squad training camp areas/ youth camp	Pj	BS	7	30	210
12	1.12	Famil visits by MICC, MITEC & MIETV	Pj	BS	7	30	210
13	1.13	Equipment hire (water ski, SUP board, canoes, paddle boards, fishing boats, sail boats, para sails and scooters, skateboards, tricycles etc)	Pj	BS	50	40	200
14	1.14	Bait & tackle shop – equipment sale & hire	Pj	BS	6	30	180
15	1.15	BBQ boat hire	Pj	BS	6	30	180
16	1.16	Boot camp training facility	Pj	BS	6	30	180
17	1.17	Youth Camp Refurb	Pg	BP	6	30	180
LEVEL 2 PRIORITIES:							
18	1.18	Bird watching centre, field guiding, smart phone ap, hire of associated viewing equipment – camera tripods, scopes, binoculars	Pj	BS	5	30	150
19	1.19	House boat hire	Pj	BS	5	30	150
20	1.20	Iconic bird watchers welcome sign with image of rare kalkadoon grass wren	Pj	BC	5	30	150
21	1.21	Club membership drive supported by local media	Pj/Pg	BS	6	20	120
22	1.22	Moondarra wildlife walks, nature & education guided tours	Pj	BS	5	20	100
23	1.23	Promote fish stocking freshwater hatchery unique in Northern Australia with potential as a major commercial enterprise open for educational tours & raise image of MIWB	Pj	AF	5	20	100
24	1.24	Camp kitchen	Pj	BS	4	20	80

Legend: BS – Blue Sky, PF – Pre Feasibility Completed, F – Feasibility completed, AF – Awaiting Funding, C – Committed  
Source: Pacific Southwest Strategy Group Pty Ltd, 2016

Ideas that scored between 100 to 180, while not as economically attractive, could provide an important and worthwhile cultural contribution with less resource need. These ideas could provide much need in-fill amenity for committed projects.

Eight commercial ideas were big ticket items that will require considerable resources (HR, funding, IT) to acquit.

Table 7: Project/Programs by Ticket Size	
Description	Project/Program
Big Tickets:	Long Lead Time, High Cost, Project Manager
	Floating jetty, moorings & loading dock Caravan/RV Park & Cabins Equipment Hire Bait & Tackle Shop BBQ Boat Hire Youth Camp Refurb House Boat Hire
Medium Tickets:	Medium Lead Time, Medium Cost, Project Teams
	Café @ Canoe Club Party Boat Kiosk/ Warrina Park Boot Camp Training Facility Bird Watching Centre Moondarra Wildlife Walk Tours
Small Tickets:	Short Lead Time, Low Coast, User Groups (low fruit)
	Free camping grounds Internet & Smart Phone Hot Spots Remote guided tour Bush camp Triathlon Squad Training Camp Area Famil visits by tourism promoters Iconic Birdwatchers Welcome Signage Club Membership Drive Promote Fish Stocking Camp Kitchen

Source: Pacific Southwest Strategy Group Pty Ltd, 2016

Figure 37: Examples of Floating Jetty's



Source: Superior Plastech, 2016



## 8.0 COMMERCIAL OPPORTUNITIES

### 8.1 Target Market Catchments

Key to attracting tourists will be to offer services that complement the amenity and fit of the happy camper environment. Once the caravan park opens, Moondarra will have a competitive advantage over other parks in the region. If Kingfisher is chosen as the site, it will present massive skyscapes with endless changes throughout the day and night. While city sites cannot match the relaxed atmosphere or the cultural and remote bush experience.

Set out below are the commercial opportunities that have sufficient drawing power to create an organic business cluster and repeat custom.

Figure 38: LMRA Commercial Opportunities



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

So what are the critical numbers necessary for commercial sustainability at LMRA?

It starts with segmenting the lifestyle profiles that meet and satisfy the buying proposition. Therefore it was necessary to target segments similar to those identified earlier (ref Table 2) who enjoy pushing boundaries, challenging themselves, discovering country or want to kick back and relax (ref 5.1).

There are three target VALS groups of interest who provide an important numerical segment for Moondarra.

Table 8: LMRA Target Audience						
Segments	Visitor Share of Cohort					
		Mt Isa Local	Mt Isa Visitor	Qld Residents	Qld Visitors	Total
Active Explorers	11.0%	2,477	4,400	608,090	220,000	734,967
Self-Discoverers	12.0%	2,702	4,800	554,280	240,000	801,782
Unwinders	15.0%	3,377	6,000	692,550	300,000	1,002,227
TOTAL:	38.0%	8,556	15,200	1,854,920	760,000	2,538,970

Source: Data MIETV, Modelling Pacific Southwest Strategy Group, 2016

The above table provided a snapshot of potential visitors of 23,756 pax or 8.7 percent locals and VFF. While small, these visitors are multi-visitors to LMRA and an important fabric of the Lake.

It was not until analysis of Queensland residents and non-residents and visitors was undertaken that it became obvious that this target for (group?) wanted a desert experience and will require accommodation and a (on a?) large scale. That's where the commercial opportunities become more obvious.

The VALS market segment grew to 1.85 mil or 73 percent when all Queenslanders were included, and 91 percent or 2.6 million when all categories are included.

This confirmed that meaningful accommodation will be required to meet market demand as currently, it would appear that Mt Isa parks cannot offer traveller's sites as non are available.

## 8.2 Keeping Customers Interested

As part of the commercialisation strategy, consideration must be given to increasing the frequency of annual events at LMRA that identify with the environment. For example:

- Lake Fest - local music genre
- Bird Fest - migratory bird season; and
- Outback Blues & Roots Feat - genuine Outback blues, country & western & jazz.

In addition, existing further sporting events run by existing users should be further assisted with sponsorships of major cash pools to attract national and Asia Pacific competitors over the next two to five years.

Perhaps the most important addition should be the introduction of weekly/ bi-weekly musical and storytelling performances to support new business operators at Warrina

Park, Kingfisher Bay, Transport Bay and the MICC Youth Centre. These intimate fireside sessions should transfer knowledge, habits and feelings by local music, songs, yarns and poetry aimed at families and international visitors.

## 8.3 Short List Commercial Entity Outlines

### 8.3.1 Equipment Hire

The tourist equipment hire business required an understanding of popular trends in sport and special interests to determine product range and the mix of hiring patterns.

A start-up prior to the introduction of an anchor tenant caravan park and using the most recent visitor count (ref MIWB report 2013) of 60,000, this would suggest an average of 164 prospective customers per day.

If the range of equipment hire met the needs of visitors, and the start-up established a market niche, breakeven would occur. Since many locals do not own popular hire items, it is likely that there would be increased visitations and hire volumes.

Following the start-up of a fully operational caravan park with an Australian park average of 54 percent occupancy (ref 9.0), an additional 60,000 visitors would visit LMRA in the first full year. This would double the equipment hire market to 120,300 customers annually or 330 per day.

The likely range of equipment for hire would include:

- BBQ self-drive boats;
- Houseboats;
- Camping equipment;
- Waterski's, SUP's;
- Canoes, kayaks;
- Fishing boats;
- Fishing rods and equipment;
- Mountain bikes;
- Children's bikes and scooters;
- Geological tools and guidebooks;
- Ornithology guidebooks, binoculars etc;
- Ticket sales:
  - o Bush camp equipment, gas bottles and site licenses;
  - o Tours – bike, ornithology, geology;
  - o Aquatic climbing castle;
  - o BBQ boats;
  - o Rock climbing;
  - o Water skiing
- Market size 120,000 customers minimum
- Start-up prior to anchor tenant 15 to 25% capture rate @ \$55pp/pa, would range from \$495,000 to \$825,000

### 8.3.2 Bait & Tackle Shop

This opportunity could be integrated with the equipment hire business (ref 8.3.1) or operate as an independent entity focused on fishing equipment both hire and sales. Product range would include:

- Rods and equipment;
- Lures, flies and bait;
- Fishing boat hire;
- Fishing guides; and
- Tours of hatchery.

Approximate income for the start-up prior to an anchor tenant based on 60,000 visitors and \$30pp/pa at -10% to 15% capture rate would provide an income of between \$180,000 and \$270,000.

### 8.3.3 Caravan Park and Camping Sites

The critical success factor for the commercialisation of LMRA will be a quality, well designed caravan park.

The inclusion of contemporary, well designed cabins with full length verandas will be a major drawcard almost from day one.

It is proposed that a larger site plan than Lake Awoonga is used because of the high-end environmental quality and remote locale (ref section 9).

Key will be its location within LMRA and options could include several sites but the most logical and cost-effective one would be Kingfisher Point. Based on a configuration of 60 caravans/RV sites, 40 cabins and 30 camp sites based on the latest ACIA average occupancy of 54 percent, the Kingfisher Camp could attraction approximately 60,000 additional visitors in its first full year of operations. Based on a conservative spend per head, per stay of \$120, gross sales income would be \$7.2 million. This should be sufficient to attract an experienced investor based on a long term lease sufficient to recover capex of attractive ROI.

### 8.3.4 Party Boats and House Boats

In the past, hire boats (often referred to as pontoons) met with mixed success so that any re-launch will require a larger number (roster) of fully qualified captains to host international groups.

Any financial modelling of this commercial opportunity was not possible because it depended on vessel, its survey, fit out, safety regulations and size, especially when compared with self-drive vessels such as house boats or BBQ boats. Therefore, it will be necessary to establish vessel specifications, capital expenditure (capex) and operational expenditure (opex) frameworks before any forecast revenues could be developed.



### 8.3.5 Birdwatching

Birdwatchers are non-invasive participants in any area for Lake Moondarra because they are currently an untapped sector with large disposable income looking for new experiences.

Using US figures as a basis, Australia most likely had about 4.5 million (19.1%) bird watchers in 2014. Also based on the same average spend per head of populations in the US, Australians conservatively spent \$50 pa or around \$223 million in 2014. This compares with US spend of \$32 billion in 200/2001.

In terms of Australian bird watchers, Lake Moondarra offers two very distinct opportunities; the migratory birds and the rare scrub wren seasons.

### 8.3.6 New Café at Transport Bay

Food service once thrived at Transport Bay and Warrina Parks but custom fell away as patron expectations changed. There have been many examples of successful shopping strips or retail areas that decline in popularity and close without any logical explanation. Some research was undertaken to ascertain reasons for the closure of services at LMRA, but no likely causes were uncovered.

Typically, shopping strips closures are caused by poor service, escalating costs or misunderstanding of changing tastes and trends of the consumer. This was probably the reason for the closures at LMRA.

However, the changing expectations of built assets and services standards are especially understood by the Y generation. It is the food and beverage sector that will best support the new Kingfisher Caravan Park with its fresh, low cost friendly service. Set out below is a practical, low cost delivery popular with all generations.

Figure 39: Example of a Trendy Low Cost Pop Up Cafe Suitable for Existing Canoe Club Site



Source: Pacific Southwest Strategy Group, 2016

It is too early to predict the precise fitout costs or sales turnover, but experience suggests that an ideal location for the first café would be at the North West Canoe Club where a 36m<sup>2</sup> area once housed a food outlet.

Based on a small kitchen with minimum on-site food preparation and with approval of MICC Health Department, use of external tables, umbrellas and chairs, the capital expenditure (capex) using second hand café and food service equipment would be \$8,000. Clean up and restoration would be \$10,000 and redecoration and sign writing a further \$5,000 with espresso machine provided by a reputable coffee supplier FOC. Therefore, an attractive pop-up café could be established for between \$23,000 and \$25,000. Figure 40 is an example of a low-cost entry that has proved successful.

Operational costs are more difficult to assess, but would require minimum daily sales of coffee \$630, food \$500 or \$1,130 total per day.

### 8.3.7 Free Camp Area

The introduction of a free camping site with toilet pit, tank water and bush campfire will appeal to many young travellers and backpackers who travel light and cheap. Research shows that this sector has money, but reluctant to part with it for anything ordinary. Good coffee, food and dinky die Australian experiences are the exception.

Free means free with guests applying for permits on-line or at the visitors counter at Outback @ Isa, but often value-ads will occur at the VIC service desk. The decision to provide a free camping area will depend on the management chosen.

It is recommended that the free camp model be based on the Boyndale Bush Camp. (It should not be confused with a Guided Bush Camp Experience into the hills around LMRA).

## 9.0 LAKE AWOONGA RECREATION AREA (LARA) CASE STUDY

This case study looked at the commercial aspects of the Lake Awoonga Recreation Area (LARA) relevant to Lake Moondarra Recreation Area (LMRA).

Both impoundments provided similar functions to industry and local government as water storage and supply facilities. As part of their charter the Water Boards set aside areas for tourists and locals enjoyment that included playgrounds, BBQ's, picnic shelters, toilets, showers and boat ramps, with major improvements between 2001 and 2006.

Figure 40: LARA Picnic Shelters with Lake Vistas



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

At the time, both sites hosted small commercial enterprises such as cafes, equipment hire, house boats and services such as Barrawonga fishing guides at LARA, which is still replayed on popular on TV fishing shows.

Business enterprises at both sites prospered primarily due to the amenities and expansive views of lakes and environs. LARA also had a caravan park which provided cabins and camping areas. By 2005, GAWB introduced the Boyndale Bush Camp on the Boyne River on a large site with limited pit toilets, fire pits, rubbish bins and without potable water. The bush camp has thrived due to the simplicity of entry conditions.

Applications for free camping are made on-line or via the Gladstone Visitor Information Centre (VIC).

According to GAWB there have been no major littering or vandalism issues as rangers visited daily and there are always the continuous presence of campers.



On the other hand, LMRA took a more a conservative position and decided not to allow caravan parks or camping in the R48 Reserve except on special occasions. In the past LMRA hosted businesses such as kiosks, BBQ boats and houseboats but these no longer operate due to lack of patronage.

Figure 41: LARA Picnic Shelters with Lake Vistas



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

Inspections at both sites in 2016 found that LARA had received strong industry and community support for its master plan and construction, especially from the mayor of Gladstone City Council. This support was evidenced in the quality of facilities available at the site. On the other hand, LMRA received neither political support nor funds for its recreation plans to the point where development came to a standstill.

#### Commercial Operations:

According to GAWB, its caravan park was problematic until the lease was extended from annual renewal to 20 years (10 + 5 + 5), thereby enabling the operator to more confidently invest in and promote the park. This changed the dynamics of the business from marginal yields to a higher ROI.

In fact, if LARA's current capacity of 50 caravan/ camp sites and 31 cabins was increased, it would increase turnover, gross profits and improved rental fees for the Board.

Figure 42: LARA Boat Ramp and Camp Ground



Source: Pacific Southwest Strategy Group, 2016



At LMRA, the introduction of a caravan park on a larger footprint and with a 20 year lease would be irresistible to an experienced greenfield investor.

For example, the construction of 60 caravan/RV sites, 40 cabins and 30 camp sites would create an additional 44,600 pax pa at 40 percent occupancy or 55,800 pax at 50 percent occupancy. This compares with the Australian average occupancy of 54 percent (ref ACIA 2016) which would result in 60,300 additional visitors at LMRA each year.

This would effectively see the doubling of tourist numbers to LMRA, who spend \$286 a day and \$180 on accommodation. Let's say they spend \$120 at LMRA Caravan Park, at 54 percent national average rate, gross revenue would be \$7.2m pa.

Figure 43: LARA Notice of Entry and Entry Gates



Source: Pacific Southwest Strategy Group, 2016

Add to this the unique geological structure of the landscape and its flora and fauna appeal, it would attract those caravaners who would otherwise drive through Isa due to its lack of park sites.

The small businesses at both sites closed or moved away due to damage caused by the 2013 floods or poor trading. The LARA restaurant did not reopen due to building foundation damage, and nor did the houseboats or BBQ boats return to either sites for various reasons.

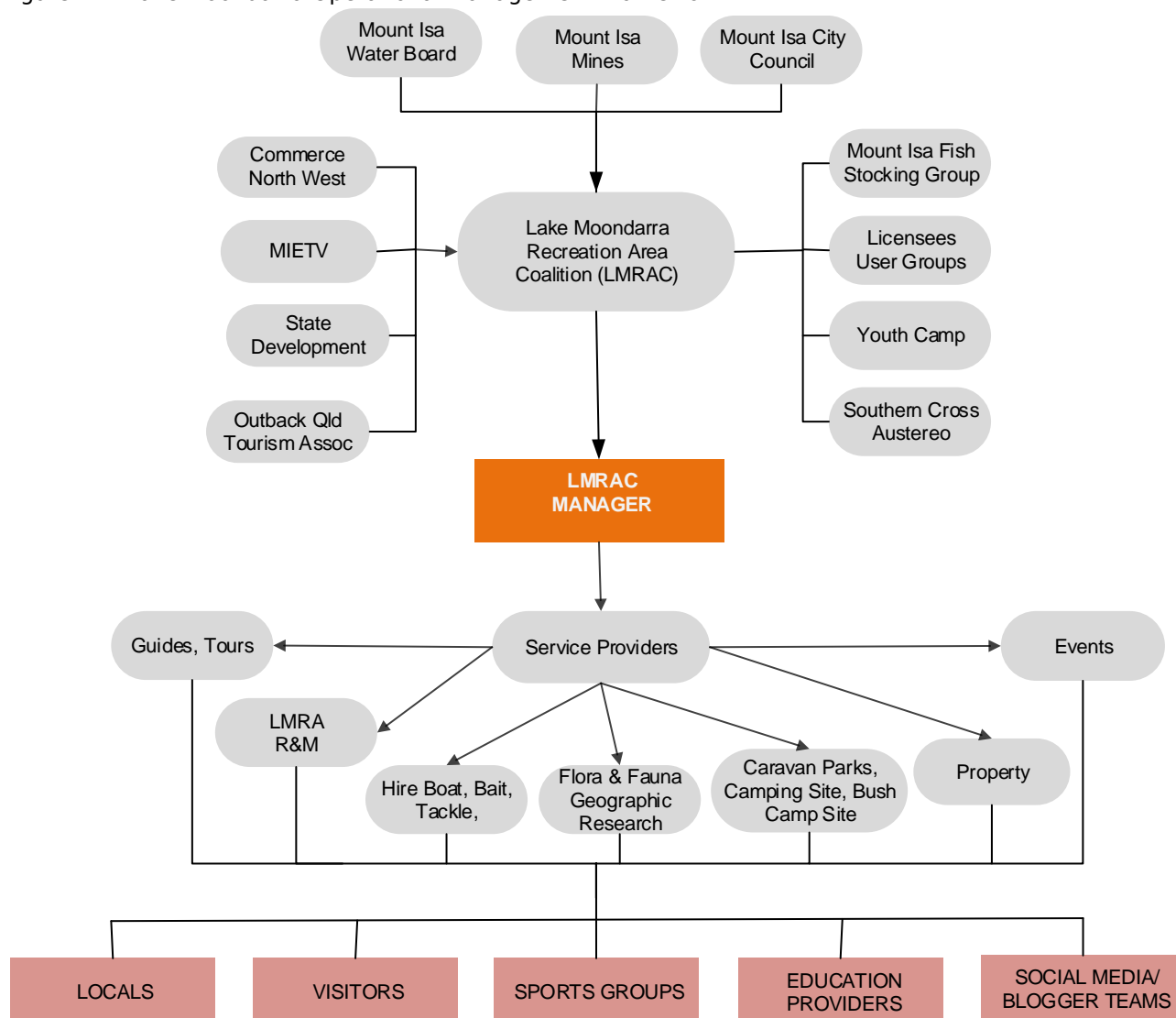
This case study highlighted the need for a caravan park as the strong commercial anchor that, with sufficient sites can be sustainable, despite the trading ebbs and flows common in a seasonal tourist business.

## 10.0 DRAFT MANAGEMENT PLAN

### 10.1 Proposed Management Framework Map

The success of the development strategy will depend on simple but reliable implementation of agreed achievable projects and programs supported by a coalition of key stakeholders proposed in the framework below:

Figure 44: Lake Moondarra Operational Management Framework



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

This proposal is a radical change from the current management structure but necessary due to the size and the MIWB's limited resources (HR, financial and IT) and the necessity to have a not for profit entity in place to attract and maximise grants, donations and sponsorship within entity guidelines yet to be established.

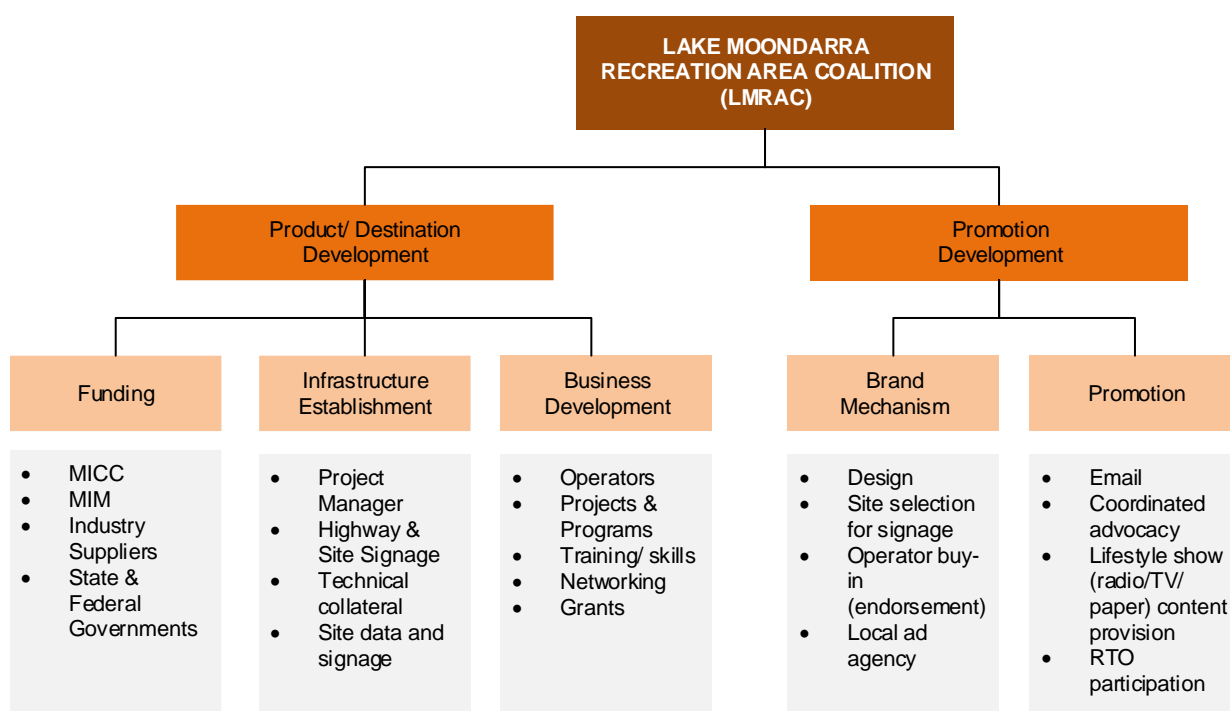
## 10.2 Draft Coalition Make Up (MIRAC)

While the coalition will be separate to the MIWB, it could operate as a steering committee initially and have a make-up of nine members (including chair) from:

- Mount Isa Water Board (MIWB);
- Mount Isa City Council (MICC);
- Mount Isa Mines (MIM);
- Commerce North West;
- Department of State Development, Infrastructure & Racing;
- Radio Station;
- Mount Isa Ski Club;
- Canoe Club; and
- Two Guides; and
- Manager (one year secondment)

The role of the Lake Moondarra Recreation Area Coalition (LMRAC) could include the following tasks:

Figure 45: Lake Moondarra Development Functional Map



Source: Pacific Southwest Strategy Group Pty Ltd, 2016

### 10.3 Operational Modelling

The geographic spread, absence of any enforceable control mechanism (new by-laws under review) over the recreation area and the lack of a viable business opportunities make commercial business unviable and impractical. The above function map provides an alternative concept to current operations and has the potential to generate higher productivity and innovation.

### 10.4 Action Plans

It is proposed that projects and programs be simply spelt out as Action Plans to be handed out to volunteers, users and MIRAC Steering Committee members.



Project: 1.01 Floating Jetty, Moorings & Loading Dock (Project)

**NB: THIS IS AN EXAMPLE ONLY**

Status: Blue Sky

Goals:

- Attract investment (grants, CSO, operators)
- Drawcard for Eco Tourism
- World class wilderness experience
- Better living for locals
- Major international eco-brand

Investment Enablers:

- Asset growth via long term lease
- Acceptable ROI Capital
- Identifiable unmet market need
- Proximity to water and scenic views
- High cost start-up

Action Plan:

Code	Task Description	Target Date	Completed	Financial Period	Amount	Responsibility
A	Form working group to identify & substantiate demand	30 Jun	30 Jul	2016-17	N/A	MICC, Commerce North West, MIM, MIWB
B	Explore concept designs for concept with options for expansion					
C	Undertake pre-feasibility to determine unmet demand. Prepare costing models into ROI					
D	Determine value to local community & funding models with & without fee changes & sponsorship go/no go					
E	Prepare full feasibility including development costs, capex, opex, P&L to EBITDA					
F	Seek assistance in testing investment demand & under what circumstances					
H						

Project Comments: While desired by locals, the construction of a floating jetty is a big ticket item (capex \$100,000) with little hope of a ROI and therefore unattractive to investors. However, it is highly recommended that the project be further investigated including the development of an innovative fundraising strategy which may include seed funding via CSO contribution from the industrial sector and suppliers.

Project: 1.01 INSERT PROJECT NAME (Project)

BLANK TEMPLATE

Status: eg. Blue Sky, Feasibility, Pre-Feasibility etc

Goals:

- 
- 
- 
- 
- 

Investment Enablers:

- 
- 
- 
- 
- 

Action Plan:

Code	Task Description	Target Date	Completed	Financial Period	Amount	Responsibility
A						
B						
C						
D						
E						
F						
H						



Your project team for this study was Phil Graham, who figured it out; Meagan Kruger, who checked it out; and Richard Elliott, who made the coffee.

## Minimising Risk

A common sense approach to planning



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